



Transparency at Bernalillo County

Case Studies in Online Financial Transparency

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Bernalillo County

- Located in central New Mexico
- Incorporates the City of Albuquerque
- Population 676,953
- Employs 2,661 full time employees
- 5 Commissioners
- 5 Elected Officials
- County Manager oversees 30+ departments offering wide range of services such as animal care, jail, roads, fleet, fire, emergency communication

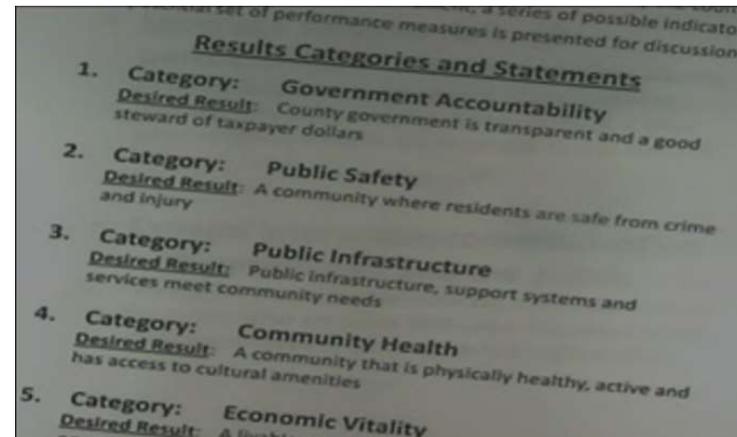




How it got started

2010
to
2014

- Commissioner pushes for transparency
- Sunshine Laws & transparency report card
 - Employee salaries, checkbook, tax dollars at work online
- Performance Measures - oversight moved from budget to county manager's office
- Benchmarking (ICMA)
- Developed Strategic Plan (PDF online)
- Performance Book (PDF online)





How it evolved

Late
2015

- Change in administration & reorganizations
- Business Improvement & Performance Office created to focus on
 - Strategic Planning
 - Performance Management
 - Business Improvement Initiatives
- Work started on this by the prior administration but neglected for a couple of years
 - Needed to rebuild trust from departments
 - Built new process from scratch
 - Measure what matters!



How it evolved

- Key drivers for improvement

Transparency

Has to be easy to...

- Use
- Understand
- Access

Accountability

Measure what matters
Management tool
Data collection & integrity
Review meetings



Plan for Improvement

- “As-is” vs. “to-be” analysis used to build the plan
- Presented this plan to the county manager and got approval

Early
2016

As is

To Be

Performance Data (PDF
book with data tables)

Open Data/Dashboards &
Webpages

Strategic Plan (static PDF,
high level)

Live interactive Strategic
Plan online – drill to detail

Financial Data Available
Online (PDF, queries)

Easy to use transparent
reports & dashboards



How it got going

Early
2016

- Looked at others doing it well & outreached to them
- Process improvement - this is critical
 - No point in building dashboards if data not good or not tracking meaningful measures
 - Worked with all departments to improve their performance measures
 - Focus on 'Why is this important'
 - Didn't accept: "Because we've always tracked this"
- Started researching tools needed for transparency
 - Data from all different systems (excel, SAP, Accela, etc.)
 - Needed a system that could be managed independent of IT
 - Easy to use, easy to understand



How it got going

Early
2016

- Got funding approved for
 - **Web page development**
 - Vision was to tell the story, not just dump data, and link performance measures to the strategic plan
 - **Dashboards/reports**

**BUDGET
CRISIS**

- Project funding cut
 - Vision was the same
 - Without the interactive graphs/web pages
 - Created template using Word with Excel graphs



How it got going

Mid
2016

Two things happened:

1. ICMA Platform discontinued

- Cost savings
- System replacement (easier to get approved than new system)

2. Found **OpenGov**

- Strong transparency & financial platform
- Offered a new platform for performance data
- Public sector specific functionality
- Procurement – able to utilize GSA

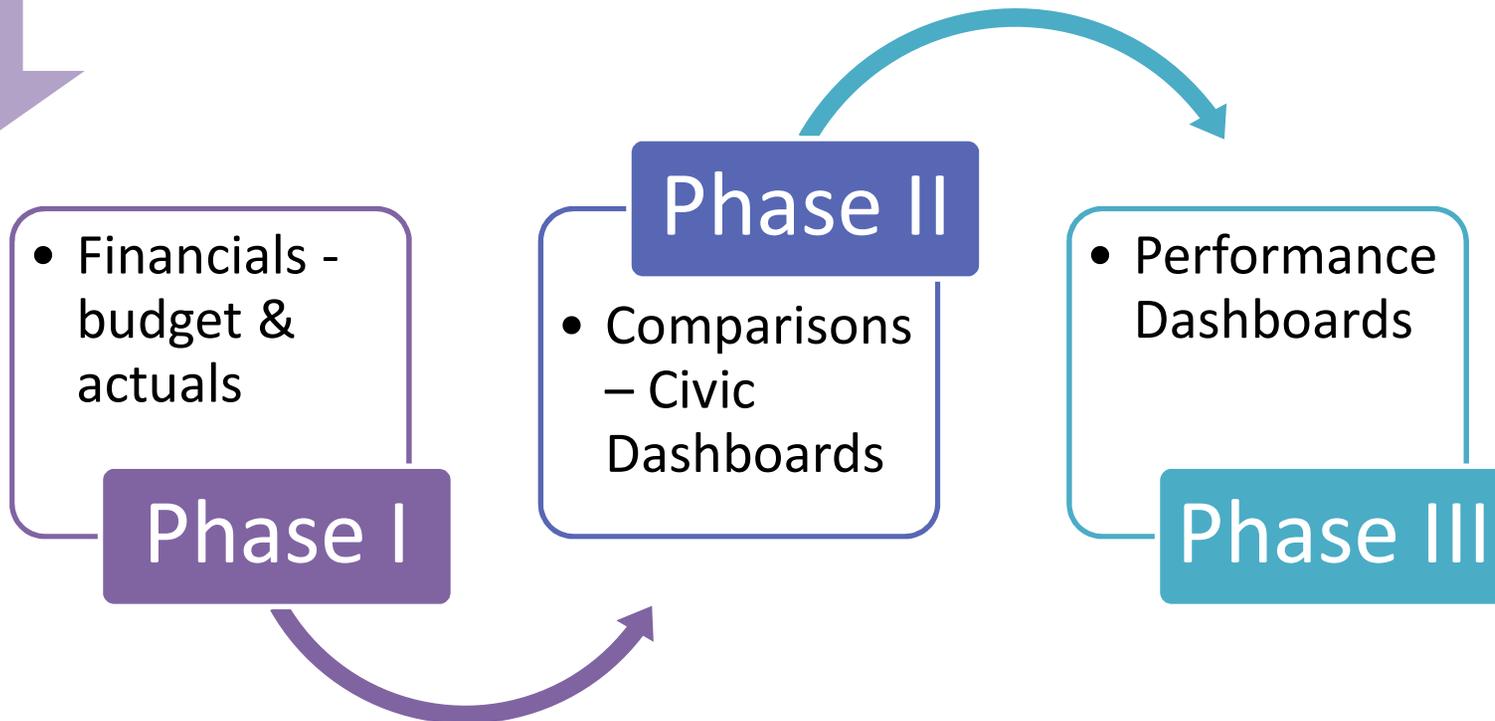
✓ OpenGov contract approved in Sept 2016!



How it got going

- Kicked off in early Nov. 2016 → went live May 2017
- Communicated transparency plan to all departments & elected officials

Late 2016 to Mid 2017





Transparent Web Pages

Late
2016
to
Mid
2017

- **Web Page Development**
 - Concurrent to OpenGov implementation
 - Needed a place to make dashboards available to the public
 - Existing performance book
 - Out of date
 - Not easy to use or find (PDF with tables of data)
 - Not being used (# of hits)
 - Consultants helped with initial build out of page templates
 - BIPO fully manages all updates to these pages



Transparent Data bernco.gov



HOME A-Z SERVICES BERNCO MEDIA FORMS AGENDAS JOBS TALK TO US HOW DO I? CONTACT US VENDOR INQUIRY



GOVERNMENT COUNTY SERVICES BUSINESS SERVICES YOUR COMMUNITY **BERNCO VIEW** ONLINE SERVICES

Mid
2017 to
Current

Transparency

- Bernalillo County Unclaimed Deceased Persons
- Building Permits & Zoning
- Fire Department Reports
- Legislative Priorities & Lobbyists
- Ordinances
- Public Information Requests
- Strategic Plan and Department Performance

Where Do My Taxes Go?

- Credit Card Information - Commissioners, County Manager and Assistants
- Audits
- Budget
- Checkbook Register
- Contracts
- Emergency Procurement Awards
- Labor Relations
- Local Taxes
- OpenGov Financials
- Sole Source Procurements
- Tax Dollars at Work

Elected Officials

- Elected Officials
- Campaign Contributions
- County Government Meetings/Agendas

County Employee Information

- County Manager/Administration
- Employee Salaries
- Union Contracts
- Job Descriptions



Interactive Strategic Plan Goals

Government Accountability

Transparent & accountable use of taxpayer dollars



Public Safety

Community where residents are safe from crime & injury



Economic Vitality

Thriving, livable community with diverse economic opportunities



Community Health

Healthy and active community with access to cultural amenities



Public Infrastructure

Meet community needs by supporting infrastructure owned by county or for public use (e.g. roadways, facilities, systems)



Web Hits:

- 2 years = 14k
- Average 600 per month

<http://www.bernco.gov/finance/strategic-plan-and-department-performance.aspx>



Public Safety



PUBLIC SAFETY

Community where residents are safe from crime & injury

Responsive to emergencies



- 911 Calls
- Sheriff response time
- Fire dispatch to arrival
- Animal Care calls

Promote well-being through behavioral health initiatives



- Children's mental health clinic
- Peer Support
- Community Engagement Teams
- Inebriate Intervention services
- Mobile Crisis case reviews
- Awareness & Prevention Programs
- DWI Arrests

Recruit & retain optimal workforce



- Increase number of sworn deputies
- Correction Officer hiring & retention
- Fire fitness program

Provide reliable fire protection & emergency planning



- Emergency exercises
- Fire inspections
- Emergency operation plans
- Code Red Alerts
- Fire classifications
- Update fire code
- Pre-fire reports
- Incident command system

Ensure accredited & compliant services



- Emergency dispatch accreditation
- Law enforcement intelligence
- Animal code updates & fee structure
- McClendon settlement compliance
- SNAP vouchers
- Sign reflectivity compliance
- Animal license compliance
- Emergency fire dispatch accreditation



Performance Pages

P137: TIME FROM DISPATCH TO ARRIVAL FOR EMERGENT CALLS WITHIN 10 MINUTES

Measure Overview

#	Performance Measure	Strategic Plan Goal	Business Strategy
P137	Time from dispatch to arrival for emergent calls within 10 minutes (%)	 Public Safety	 Increased Effectiveness

Why is this measure important?

Commonly tracked performance measure for Fire and Rescue. Demonstrates ability to provide both medical and fire services.

Where does the data come from?

Emergency Reporting System (ERS) - Combined with Computer Aided Dispatch (CAD) for location and time; Run report

How is the measure calculated?

Calculate time from dispatch to arrival at scene. Number of calls within timeframe divided by total calls.

Who to contact if you have questions?

↳ P137-1 - Time from dispatch to arrival for emergent calls within 10 minutes (%)



FY19 TARGET

90%

% of arrival within timeframe

FY20 TARGET

90%

% of arrival within timeframe

TREND ANALYSIS





Transparent Process

BUILD FOUNDATION

Determine "Why do we exist?" and "What do we do?" to build the foundation for objective and performance measures

[Learn More](#)

**Build
Foundation**

DEVELOP FRAMEWORK

Create a plan to support the foundation by setting objectives and performance measures to guide the County over the short...

[Learn More](#)

**Develop
Framework**

ANALYZE & REVIEW PERFORMANCE

Review objectives and performance measures with county leadership to address accomplishments, updates, and obstacles

[Learn More](#)

**Analyze &
Review
Performance**





Analyze & Review

What are the meeting logistics?

What needs to get set up?	+
Who's invited?	What are performance priorities?
What do we talk about?	By focusing on "what's working?" and "what's not working?", subject matter experts (SMEs) have an opportunity to discuss accomplishments, obstacles, and updates for performance measures and objectives. Departments review the actual results in comparison to the fiscal year target for objectives and performance measures. Meetings are used to ensure meaningful measurement by focusing on "why is the measure important?" and how departments are trending toward achieving the business strategies:



What's working?

In the spirit of continuous improvement, measures that are exceeding the target may need to increase the goal



Reflect

- Why has this measure been such a success?



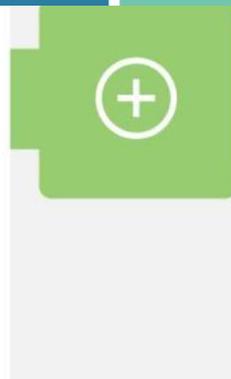
Process Innovation

- Have you implemented a new process or made changes to help meet your target?



Take Action

- Are there any adjustments needed to the target? How did you establish your target?





Department Page

FIRE AND RESCUE



Why do we exist? +

What do we do? +

Prior Fiscal Year Objectives

Matrix, Meeting Agenda, & Industry

DEPARTMENT PERFORMANCE MEASURES AND OBJECTIVES

O76: To improve the livability at fire station 43 to meet increased demands of overgrowth, wear, and tear by improving the facility

O170: Develop joint training academy with Sheriff and the Metropolitan Detention Center (MDC)

O171: Construct new west side station

O172: Demolish and rebuild Station 36

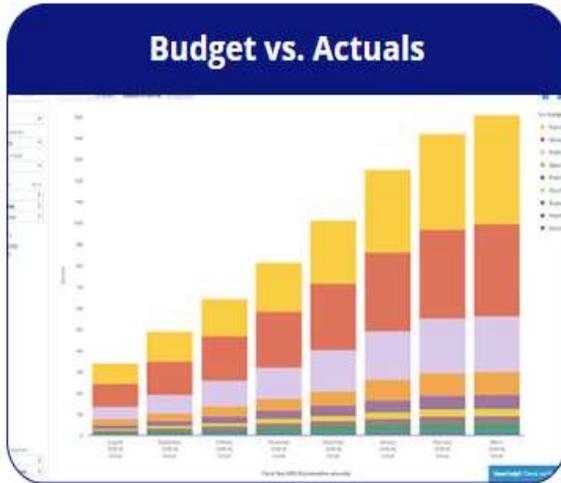
O173: Update fire code to accommodate 2015 fire code requirements

P137: Time from dispatch to arrival for emergent calls within 10 minutes



Transparent Dashboards

Budget vs. Actuals



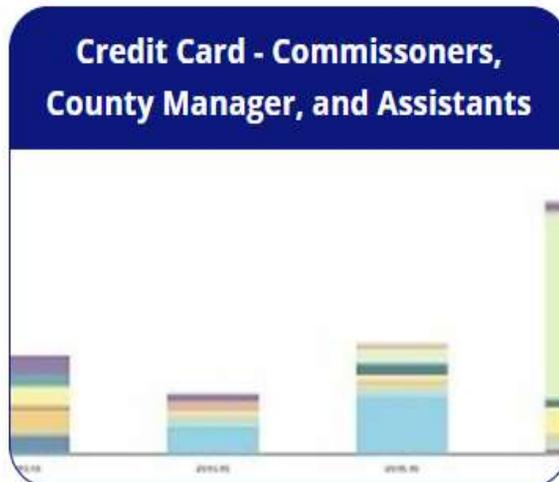
Position Count



Tax Dollars at Work



Credit Card - Commissioners, County Manager, and Assistants



Checkbook Register



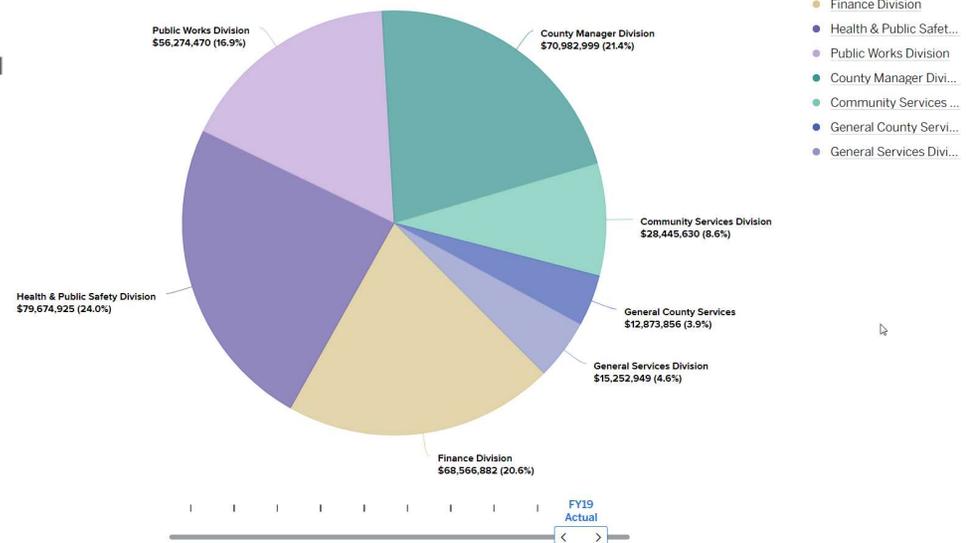
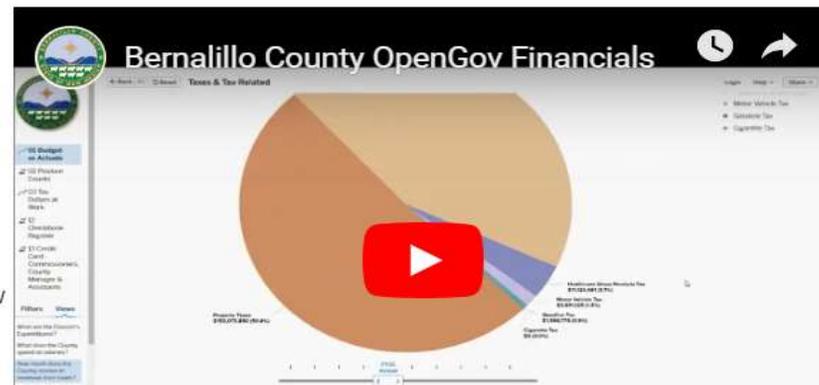


OpenGov Financials

OPENGOV FINANCIALS

Bernalillo County is committed to being a high performance organization.

As part of this commitment, the county provides financial data to the public using an interactive reporting tool, OpenGov, that helps to promote public trust and demonstrates the county's commitment to transparency and accountability. The goal is to provide accessible, easy to understand data to residents. The OpenGov dashboards allow users to click through financial information to answer important questions about the county's budget, position counts, tax dollars at work, the County's checkbook and credit card transactions. This transparency tool is supported by the Business Improvement and Performance Office (email performancemeasures@bernco.gov or call 505-468-1684).



Filters Views

What are the Division's Expenditures?

What does the County spend on salaries?

How much does the County receive in revenues from taxes?

What are the County's expenses by fund?

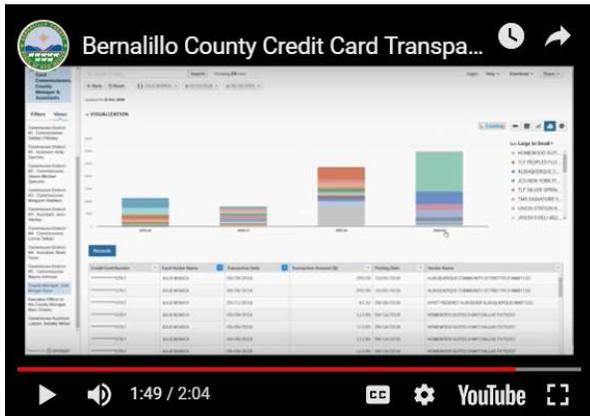
<https://www.bernco.gov/finance/opengov-financials.aspx>



Credit Card Information

CREDIT CARD INFORMATION - COMMISSIONERS, COUNTY MANAGER AND ASSISTANTS

Bernalillo County administers a credit card program designed to provide an effective and efficient method for approved County purchases. The purchase of qualified goods, services and travel are made utilizing one credit card. Cardholders can be authorized to make goods/services purchases, travel purchases, or both depending on needs of the department.



03 Tax Dollars at Work

12 Checkbook Register

01 Budget vs Actuals

02 Position Counts

13 Credit Card - Commissioners, County Manager & Assistants



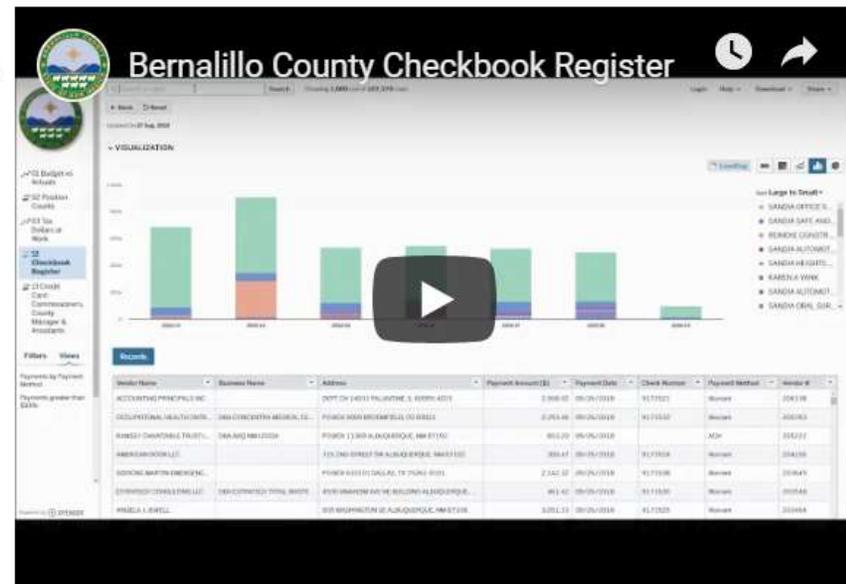


Checkbook Register

CHECKBOOK REGISTER

The Checkbook Register, powered by OpenGov, provides up-to-date financial information about the county's expenditures, allowing users to interact with data on how the county is spending money. The data is updated monthly and contains information on payments made to vendors and employee reimbursements. This page does not contain payroll information, which is available on the [Employee Salaries](#) webpage. Use the Search option to search for payments by vendor or business name, check number, or description of goods or services. Use the summary and detail tabs below the graph to get information summarized by vendor or detailed information per payment.

Accounts Payable staff works closely with vendors and county departments to ensure that payments are made timely and accurately. If you don't find the payment information you're looking for, please visit the [Accounts Payable Vendor Portal](#) or email accountspayable@bernco.gov.



[Watch this video on YouTube.](#)

<http://www.bernco.gov/Bernco-view/checkbook-register.aspx>



Internal Use

Reports

Collapse All	Q3 FY15 (Mar 2015)	Q3 FY16 (Mar 2016)	Q3 FY17 (Mar 2017)	Q3 FY18 (Mar 2018)	Q3 FY19 (Mar 2019)	FY19 Budget
▼ Taxes & Tax-Related	\$ 155,409,436	\$ 165,150,714	\$ 168,080,451	\$ 190,477,374	\$ 203,549,272	\$ 280,005,092
▶ Property Taxes	76,356,938	77,252,532	79,250,273	81,030,807	81,042,443	132,412,915
▶ Gasoline Tax	1,207,156	1,204,517	1,234,375	1,191,760	1,222,517	1,735,291
▶ Gross Receipts Tax	75,062,270	83,865,838	85,206,891	105,208,866	118,526,145	142,051,074

Dashboards

07 Quarterly Budget Dashboard for Management

Quarterly report for management that provides updates on revenues and expenditures. Dashboard is updated through the most recent quarter and actuals are unaudited.

1.0 General Fund Revenues (Qtr)

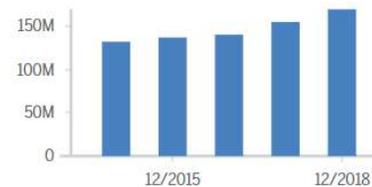
General Fund revenues by source. Major sources revenue come from Property and Gross Receipts Taxes. Other sources tax, fee, license, etc.



Updated 25 weeks ago

1.1 General Fund Revenues (Yrly)

Quarter-to-date yearly revenue trends for All Gener...



\$169,413,920.67

1.2 Tax Revenues - Gen Fund (Qtr)

Major sources of tax revenues: Property Taxes & Receipts Tax. Minor sources: Motor Vehicles, Gasoline.



Updated 25 weeks ago



Department Budget Stories

Qtrly CS: Clerk/BOE 370

Follow the hyperlink to view the detailed report or highlevel dashboard:

- [Report](#)
- [Dashboard](#)

Expense



Clerk BOE - Expenses

File Edit View Insert Format Tools Add-ons Help Last edit was made on February 20 by anonymous

Expenses

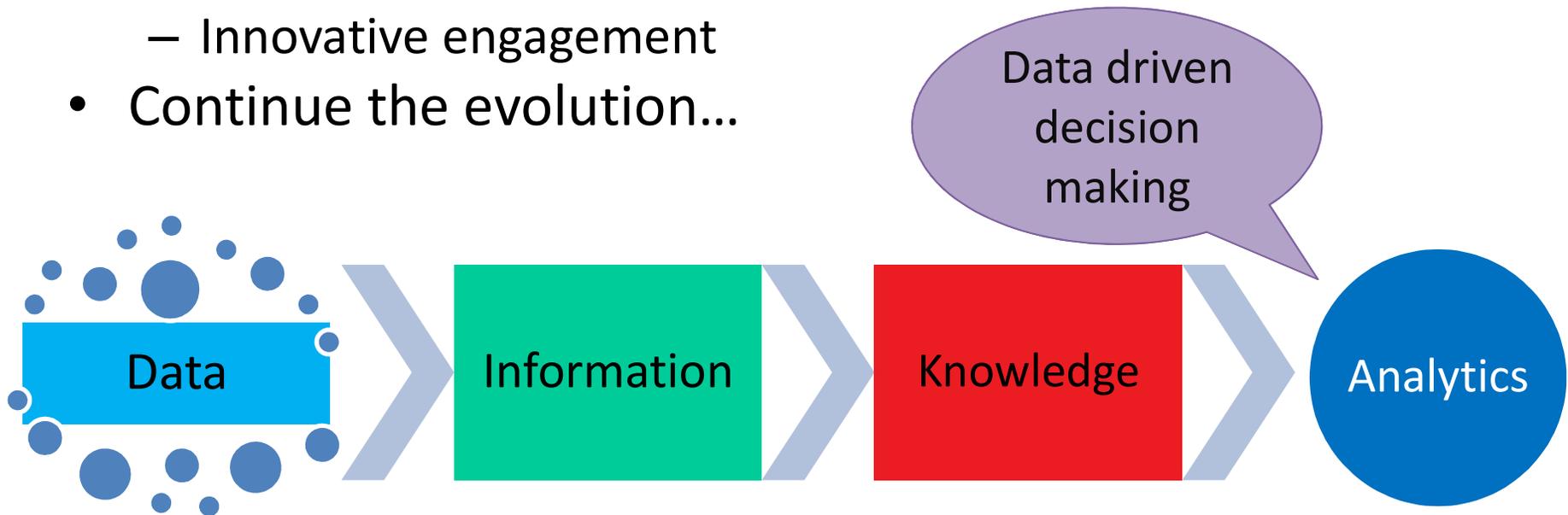
6a. EXP Actuals - Internal Orders: Click on link to answer the questions below

Quarter	Budget Questions	Department Response
Quarter 1	1) When will the unencumbered funds from the Primary IO be spent and how? 2) How are the General Election Expenses coming along? Are we sufficiently budgeted for the election?	1) We are currently in the process of doing a few reclasses that will go against the Primary IO. 2) We are projecting to be on track based on previous elections. The budget is short \$220,022 in advertising.
Quarter 2	No questions.	
Quarter 3		



Going Forward

- Process improvement
 - Lean
 - Baldrige Excellence Framework
- Continue to work on utilization
 - Innovative engagement
- Continue the evolution...





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