



# City of Littleton, Colorado

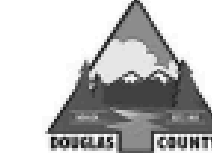
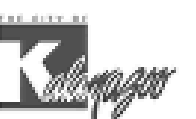
## Priority Based Budgeting

Chris Fabian  
January 9<sup>th</sup> 2018

Why PBB?

## CLIENTS

ResourceX provides priority-based budgeting software to local governments as well as the Center for Priority Based Budgeting.



Over 170 communities served across the US and Canada

# Rational Tool to Stabilize the Budget

**PBB Level**

**1**

# Scott County, MN “AAA” Bond Rating

S&P Global  
Ratings

RatingsDirect®

Summary:  
Scott County, Minnesota  
Scott County Community  
Development Agency; General  
Obligation

Primary Credit Analyst:  
Scott Nees, Chicago (1) 312-233-7064; scott.nees@spglobal.com  
Secondary Contact:  
Cora Bruemmer, Chicago (312) 233-7099; cora.bruemmer@spglobal.com

Table Of Contents

Rationale  
Outlook

Strong management

We view the county's management as strong, with "good" financial policies and practices under our FMA methodology, indicating financial practices exist in most areas, but that governance officials might not formalize or monitor all of them on a regular basis.

Highlights to the FMA include:

- Strong revenue and expenditure assumptions incorporated into the annual budget, as the county uses a priority-based budgeting model that is informed by historical trends and external data and requires the annual review and justification of expenditures;
- Quarterly budget-to-actual reporting to the county board and the ability to amend the budget as needed, though budget amendments are rare in practice;
- A five-year financial plan for the general fund that is updated annually and used as a reference point for current-year budgeting and wherein structural balance and long-term fiscal stability are goals;
- A detailed five-year capital funding sources;
- A formal investment policy

Ratings Detail (As Of November 28, 2017)		
Scott Cnty GO		
Long Term Rating	AAA/Stable	Affirmed
Scott Cnty GO		
Long Term Rating	AAA/Stable	Affirmed
Scott Cnty Comnty Dev Agy, Minnesota		
Scott Cnty, Minnesota		
Scott Cnty Comnty Dev Agy (Scott Cnty) governmental hsg dev bnds GO		
Long Term Rating	AAA/Stable	Affirmed
Scott Cnty Comnty Dev Agy (Scott Cnty) govt dev bnds unltd tax GO (Scott Cnty) (Jordan Proj) ser 2012C dtd 05/08/2012 due 02/01/2014-2022 2026 2029 20		
Long Term Rating	AAA/Stable	Affirmed
Scott Cnty Comnty Dev Agy (Scott Cnty) govt dev rfdg bnds unltd tax GO (Scott Cnty) (Northridge Proj) ser 2012B dtd 04/15/2012 due 02/01/2013-2030 203		
Long Term Rating	AAA/Stable	Affirmed

# Re-allocate Resources

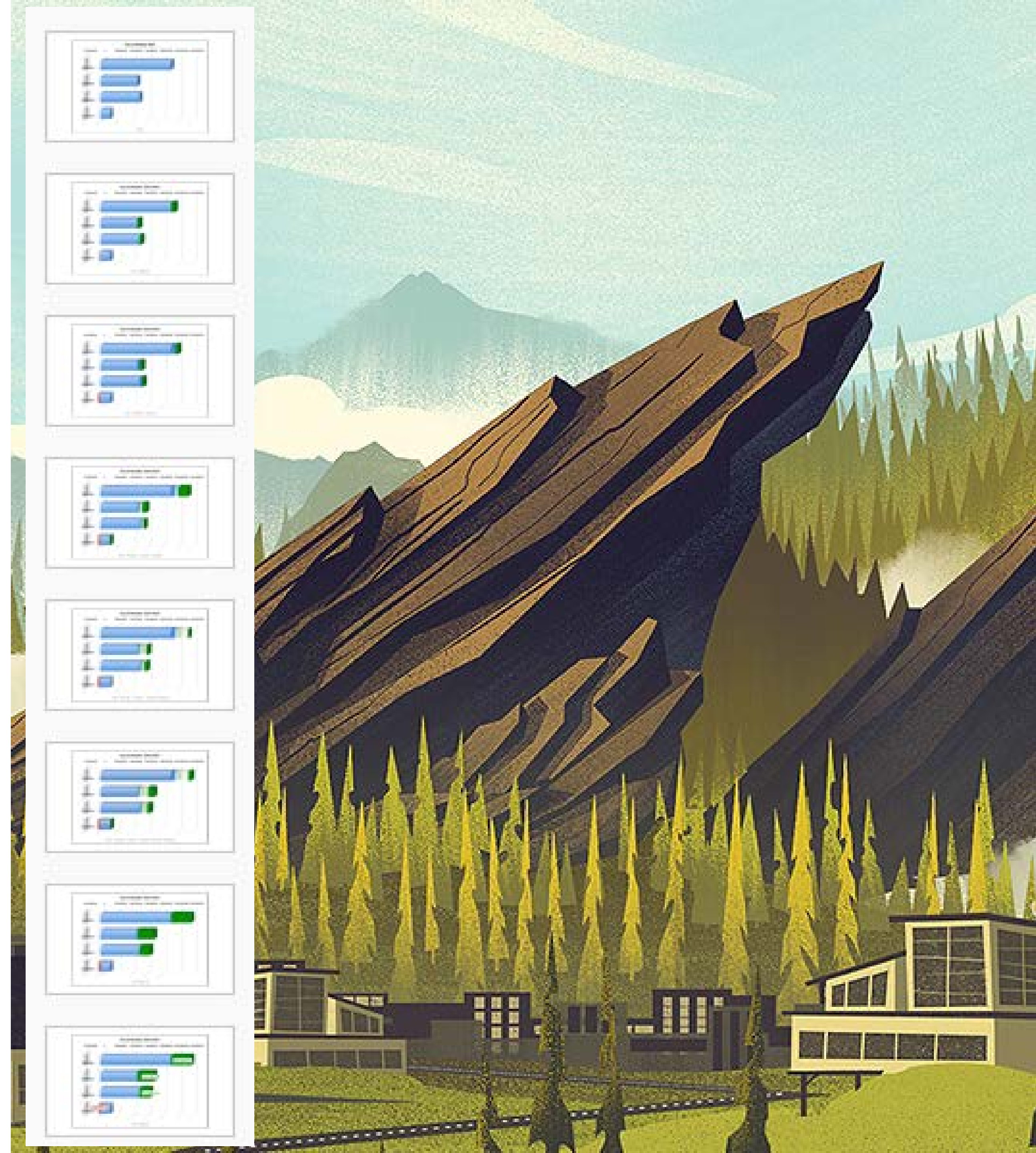
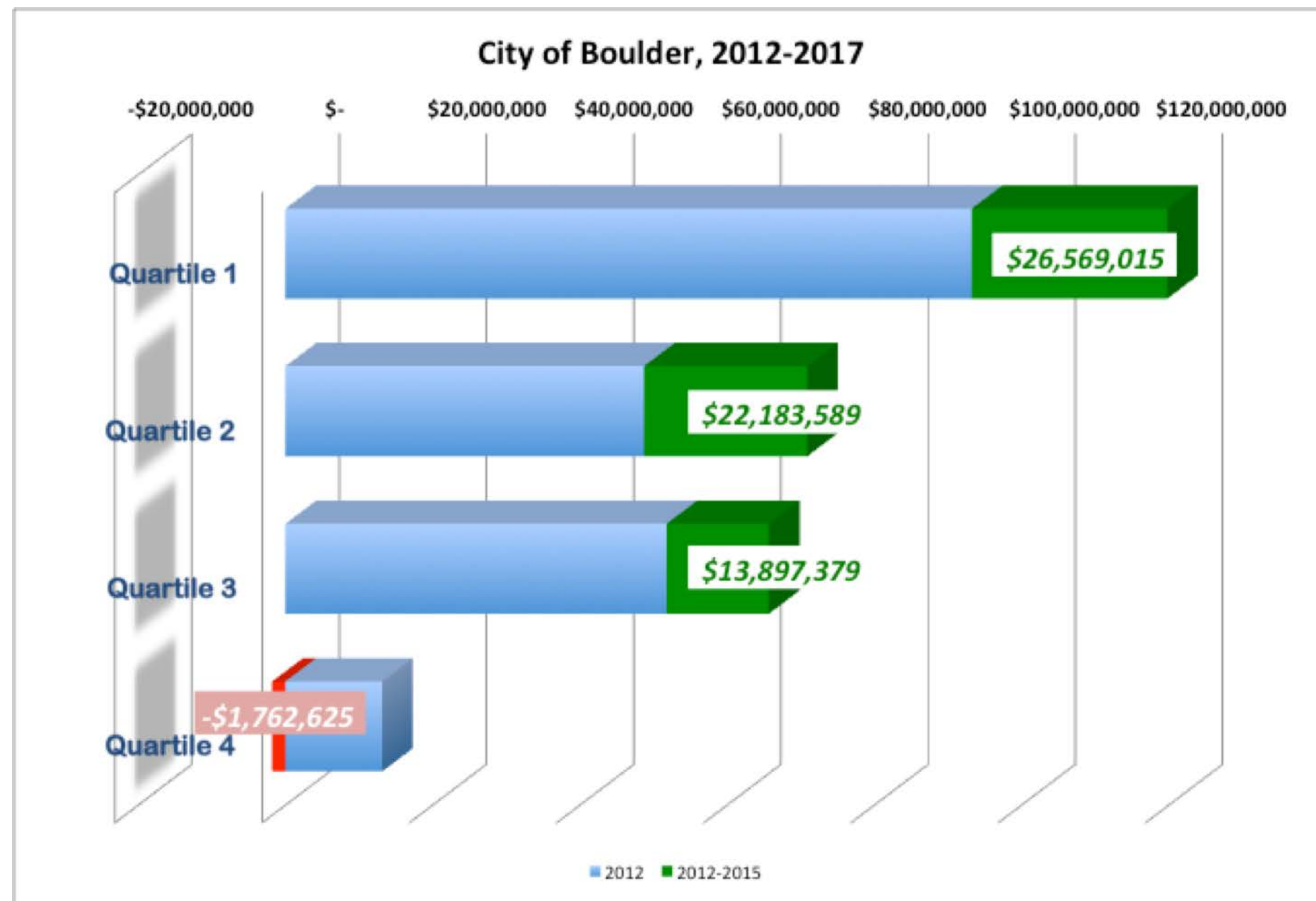
**PBB Level**

**2**



# Boulder, Colorado

- 7 consecutive years implementing Priority Based Budgeting
- **Reallocated over \$1.7m away from 4<sup>th</sup> Quartile** Programs, growing higher priority programs by over \$40m+.



# Fuel Resources Towards Challenges of Tomorrow

**PBB Level**



# Kalamazoo, Michigan

KALAMAZOO NEWS

## How Kalamazoo's 2018 budget promises new investment in your city

Posted December 12, 2017 at 06:30 AM | Updated December 12, 2017 at 01:51 PM

"I've been preparing budgets for 20 years -- never have I prepared a more exciting, forward-looking budget than what we are presenting to you tonight," said City Manager Jim Ritsema.



# Tackling Massive Goals



*A 10-year Plan to End Homelessness in  
Scott & Carver Communities*

## Kalamazoo to spend \$10M to break poverty cycle, uplift youth

POSTED 2:36 PM, APRIL 11, 2017, BY [BOB BRENZING](#)



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EMAIL

KALAMAZOO, Mich. (AP) — The city of Kalamazoo is setting aside \$10 million of the \$70.3 million given in local donations for aspirational, community-building projects mostly centered on addressing the cycle of poverty and uplifting youth in the city.



# What Works Cities Certification:

## What Excellence Looks like in Local Government

**Act:** In the last 12 months, has your local government shifted funds away from a practice, program or policy that, through rigorous data analysis and evaluation, has consistently failed to achieve desired outcomes toward a more effective and efficient practice, program, or policy?

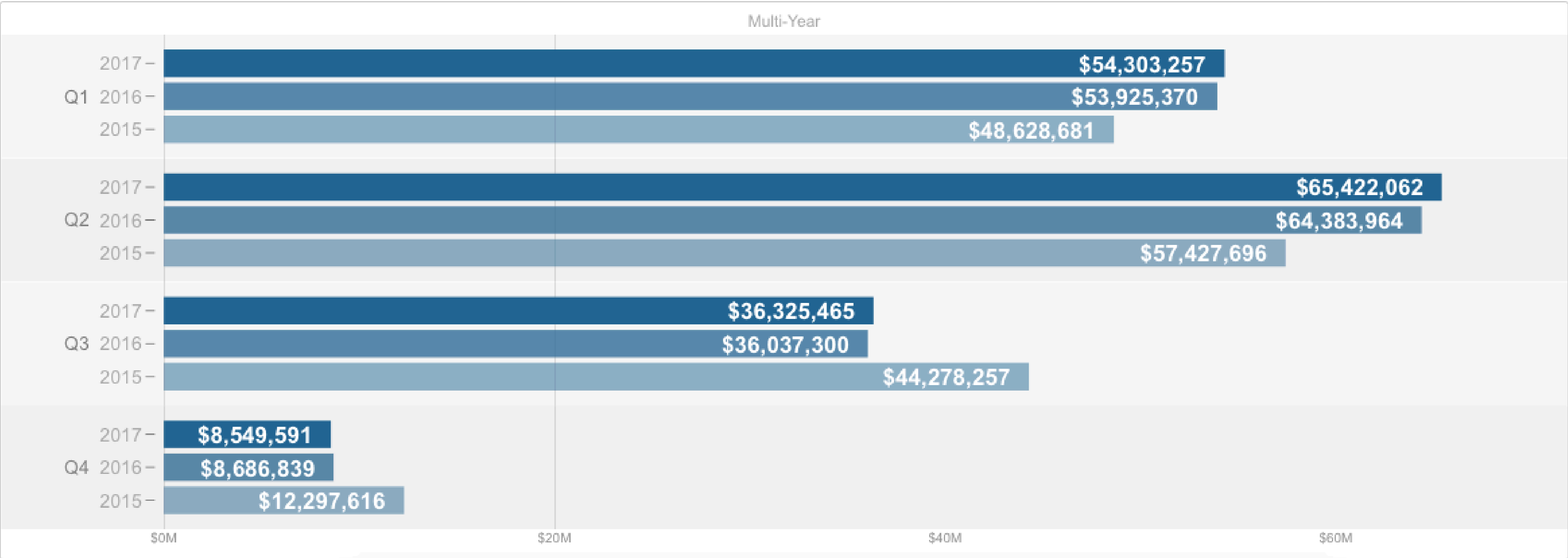
# PBB: a tool to free up, and re-direct resources

Resource Alignment +				
Department	Line Item Budget	Program Cost + Fixed Costs	Program Cost	Fixed Cost
All Departments	161,132,483	164,941,903	164,600,375	341,528

DrillDown Multi-Year Costs & Revenue Percentage Pies Table

Summarize over Years by:

☒ Quartiles ☐ Programs



Leverage ALL of Your  
Community's Resources

**PBB Level**

**4**



# Washington County, Wisconsin

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ROUTE FIFTY

SEARCH

MANAGEMENT INFRASTRUCTURE TECH & DATA SMART CITIES PUBLIC SAFETY HEALTH & HUMAN SERVICES FINANCE

## County in Wisconsin Looks to Partner With Neighboring Jurisdictions on Vital Services



### “Counties without borders:” Washington County leaders ask to merge services with neighbors

POSTED 10:05 PM, JULY 23, 2017, BY THEO KEITH, UPDATED AT 11:37AM, JULY 24, 2017

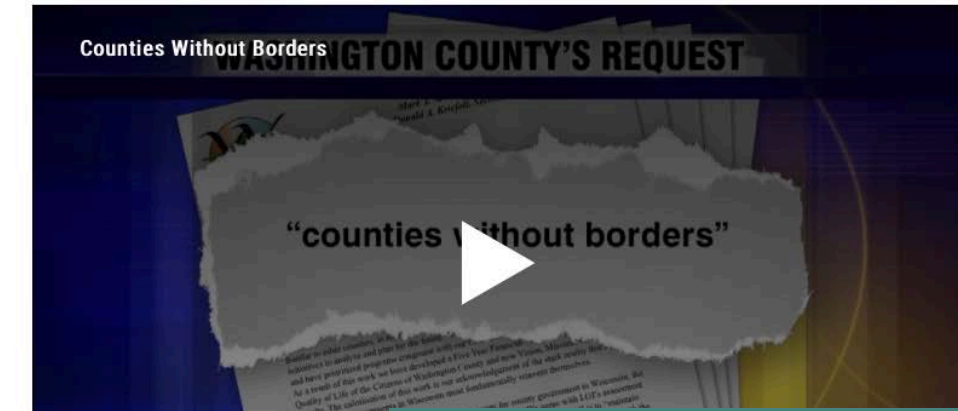
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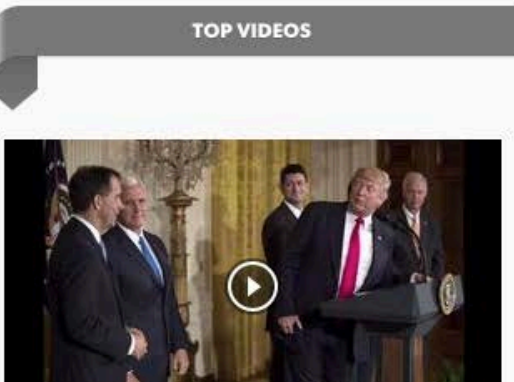
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### Washington County asks neighbors to consolidate services or merge


Don Behm, Milwaukee Journal Sentinel Published 4:57 p.m. CT July 23, 2017 | Updated 7:09 p.m. CT July 23, 2017





# Moffat County, Colorado

# \$31million, 1,097 services


[Lauren Blair](mailto:lblair@craigdailynews.com)  
[lblair@craigdailynews.com](mailto:lblair@craigdailynews.com)

## Moffat County seeks savings through local partnerships

Article Comments (0)

 Share 0
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  Pin it
  Share
  1



Some difficult changes could be in store as Moffat County looks to cut up to \$2.5 million from its budget in the next year or two, but county commissioners hoped to engage the community in their process Tuesday at a Community Resource Meeting.

At least 100 local leaders, county employees and community members packed the fairgrounds pavilion to learn how the county is working to

Identify priorities and find savings through partnering with other local organizations to provide services.

"How can we discover and partner with other organizations in our own community who are pursuing the same societal objectives we are?" Commissioner Ray Beck asked as he set the stage for the speakers who followed.

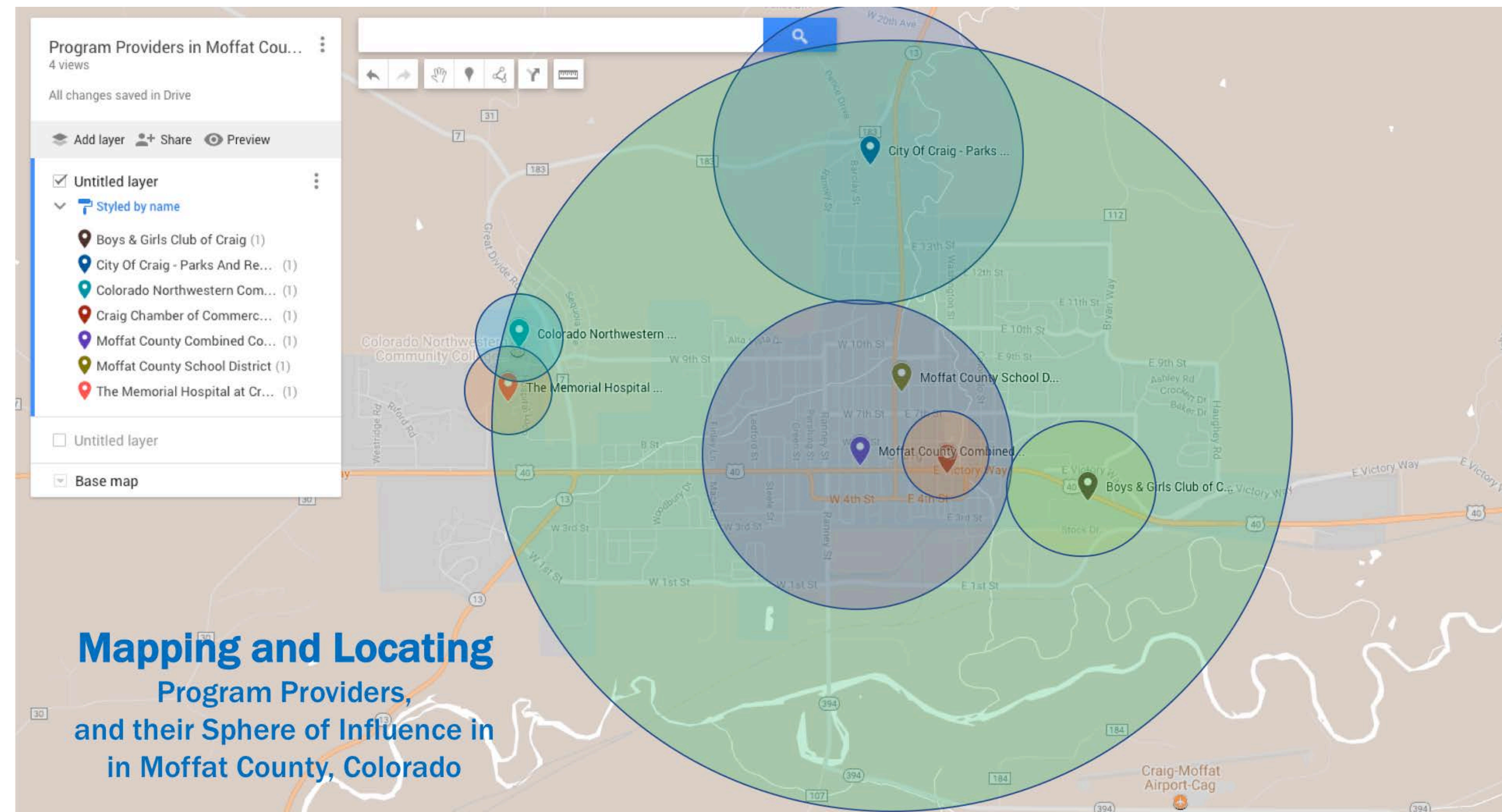
The county is looking for opportunities not only to partner, but also to consolidate or merge services with other public and private entities, Beck said.

Speaker Chris Fabian, co-founder of the Center for Priority Based Budgeting and Resource

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**"How can we discover and partner with other organizations in our own community who are pursuing the same societal objectives we are?"** Commissioner Ray Beck asked the participating agencies. The county is looking for opportunities not only to partner, but also to consolidate or merge services with other public and private entities.



# City of Toledo, Ohio

Chamber of Commerce funds half of the City's implementation of Priority Based Budgeting, in partnership to develop **“Networked Enterprises.”**

In a \$400million operating budget:

- **\$18+ million** in Public/Private Partnership opportunities
- **\$83+ million** in Intergovernmental Shared Services opportunities
- **\$90+ million** in fee recovery opportunities



## CPBB Teams with Toledo Regional Chamber to Bring Priority Based Budgeting to the City of Toledo, Ohio

Sandy Spang, City of Toledo, Councilwoman

“The story we tell ourselves in this City is that we’re broke, busted, bankrupt. And we turn to citizens begging them to understand this obvious fact, and to provide us money for what we need. But how do we stand behind this story when we collect over \$600 million every year? We’re not broke! We just choose to lock our assumptions that every dollar is spent exactly as it should be. The process and tools of Priority Based Budgeting upends this assumption and unlocks opportunities to substantially re-allocate the resources we have.”

Deloitte.

# Explore the Future of Government in 2020

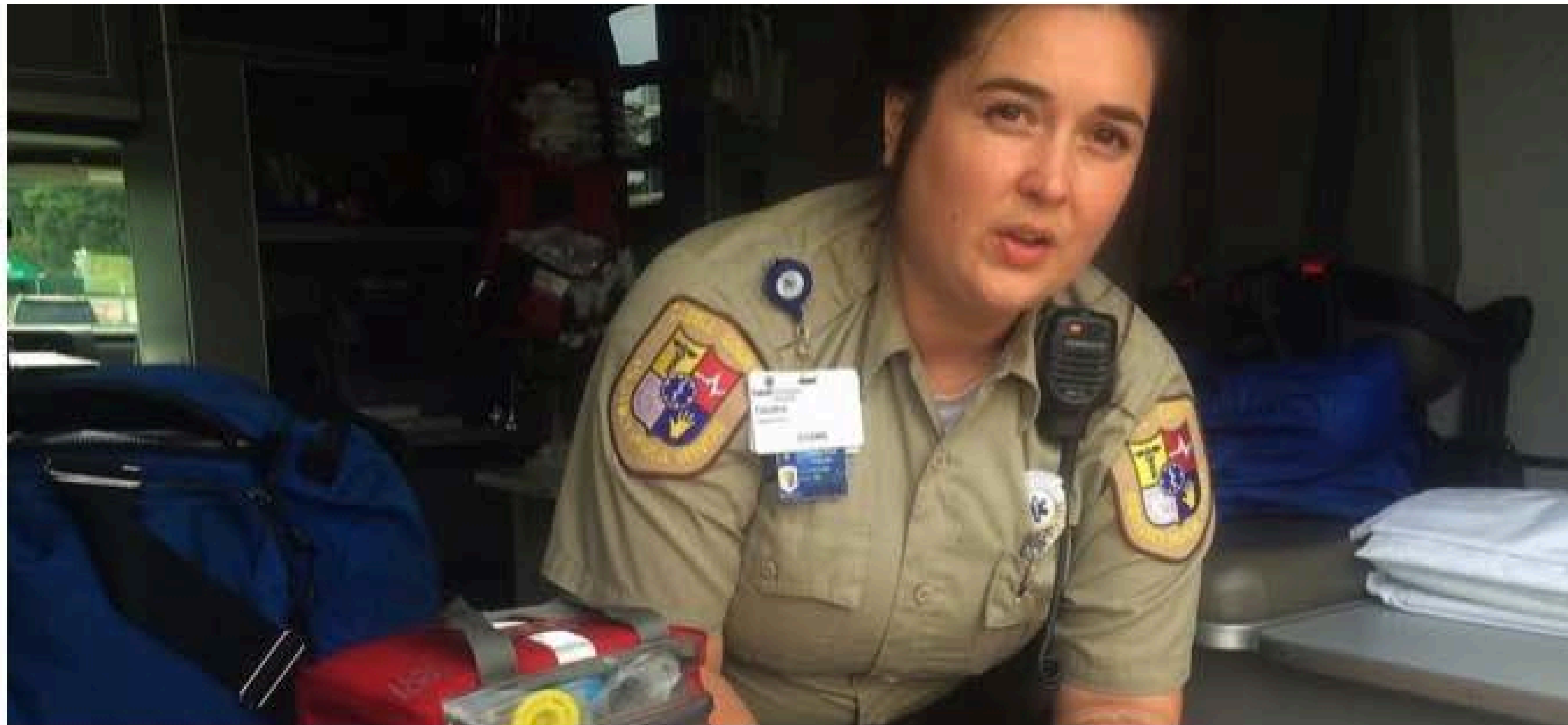
## Drivers

Factors that change the context in which government operates



The Future

# A Horrifying Statistic That Conveys the Sheer Scale of the Opioid Crisis



Cabell County EMT Tabitha Perez demonstrates how medics administer naloxone to overdosing patients, in Huntington, W.Va. (AP PHOTO/CLAIRE GALOFARO)

By [Hanna Kozlowska](#),  
[Quartz](#)

SEPTEMBER 28, 2017

In West Virginia, officials had to spend nearly \$1 million on the transportation of corpses this fiscal year alone.

Sponsor Message

ROUTE  FIFTY

## County Governments: At the Center of Everything

*The Challenges and  
Solutions Shaping U.S.  
County Governments*

The Challenges, Great Ideas  
and Big Issues Shaping U.S.  
County Governments

[DOWNLOAD NOW](#)

# Racing to Be First: How Autonomous Vehicles Will Affect Our Communities



SHUTTERSTOCK

By **Elias Stahl and Nicole DuPuis**,  
Special to Route  
Fifty

APRIL 18, 2017

A new National League of Cities report addresses the most pressing questions that local officials might have concerning self-driving vehicles.

## County Governments: At the Center of Everything

The Challenges, Great Ideas and Big  
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## New “Localism”

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# BROOKINGS

TRENDING

U.S. ECONOMY

U.S. POLITICS & GOVERNMENT

## New “Localism”

METROPOLITAN REVOLUTION

## Why the future looks like Pittsburgh

Bruce Katz and Scott Andes · Monday, September 25, 2017

### THE NEW LOCALISM

HOW CITIES CAN  
THRIVE IN THE AGE  
OF POPULISM

BRUCE KATZ  
and JEREMY NOWAK

*The New Localism* provides a roadmap for change that starts in the communities where most people live and work.

In their new book, *The New Localism*, urban experts Bruce Katz and Jeremy Nowak reveal where the real power to create change lies and how it can be used to address our most serious social, economic, and environmental challenges.

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# BROOKINGS

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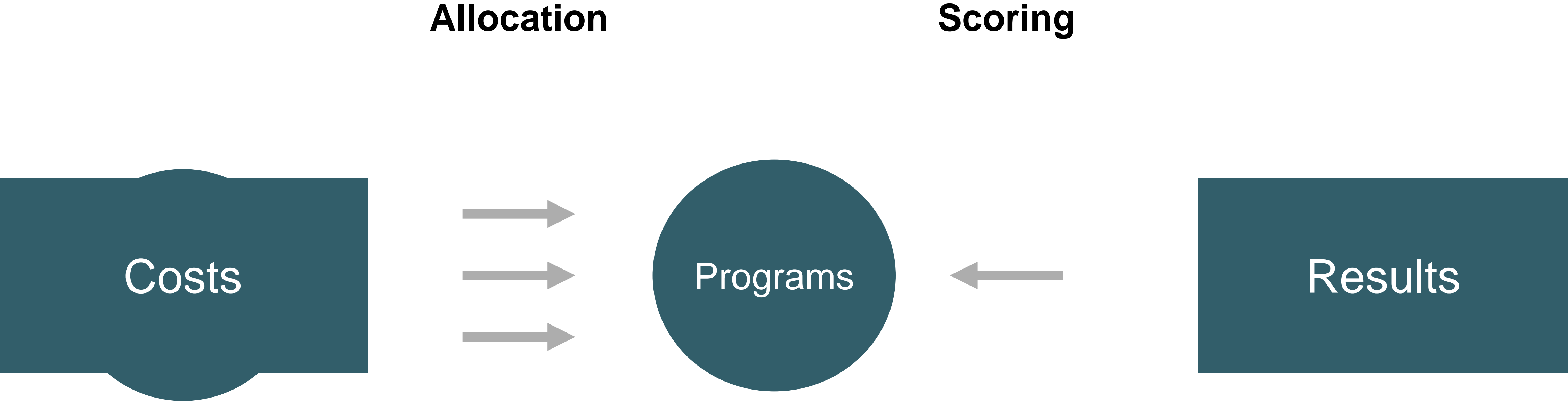
METROPOLITAN REVOLUTION

## Why the future looks like

## Littleton

September 25, 2017

How does it work?





# Result Setting

# Results: Community and Governance

---

Economic Vitality	Effective Transportation	Quality Neighborhoods	Financial Stewardship
Safe Community	Health and Well-being of Citizens	Livable and Inclusive	High-Quality Workforce
Sustainable and Maintained Development	Culture and Recreation	Smart Cities	Regulatory Compliance

Safe and Secure Community	Effective Utilities, Transportation and Telecommunications Infrastructure	Economic Vitality, Education and Workforce Development	Recreation and Cultural Opportunities	Health and Well-being of Community	Governance
...is prepared to respond to emergencies	...eases traffic flow and minimizes congestion	...attracts new businesses, and creates jobs	...supports the arts	...access to safe drinking water, clean air, waste removal	...maintains compliance with regulatory obligations
...enforces the law	...provides convenient and efficient access	...helps retain current businesses	...opportunities for cultural enrichment	...preserves the natural environment	...assists and supports decision makers with information, analysis and consultation
...reduces crime	...well-maintained infrastructure, planned for future development	...develops the workforce	...life-long learning opportunities (libraries)	...basic needs – safety, shelter, food, opportunity to work	...stewardship of financial, human and physical resources
...protects property	...provides access to multi-modal travel options (air, public transportation, bike lanes, trails)	...attracts visitors and tourism	...encourages healthy people (promotes active lifestyle)	...cares for the vulnerable (elderly, youth)	...attracts, develops and retains talent
...ensures safe air and access to drinking water	...promote efficient and coordinated sewer and water system	...provides infrastructure to support commerce (transportation, utilities, etc)	...supports community events, and entertainment options	...keeps community safe from danger (crime, disease, emergencies)	...enhances accountability and transparency in operations
...protects the environment	...ensures adequate energy and telecommunications services	...regulates growth and development	..parks, trails, open spaces	...ensures the character of the community is preserved	...seeks, leverages and creates intergovernmental opportunities and partnerships
...provides safe travel and mobility	....affordable, accessible, high-speed internet access	...enables business to function	...preservation and protection of historically significant buildings and sites	...open, inclusive and diverse	...provides timely and effective customer service



# SearchPBB to identify measurable Results and Definitions

SearchPBB

Programs

Results

☒ USA

☒ CANADA

☒ Include Definitions

State

All States

Org

All Orgs

Show

100

entries

Search:

Connected Community

Copy

CSV

Org	Result	Definition
Asheville, NC	RELIABLE INFRASTRUCTURE and EFFECTIVE MOBILITY	Constructs, Enhances and Expands a Well-Designed, Complete Transportation Network that is Safe, Reliable, <b>Connected</b> and Meets the Mobility Needs of the <b>Community</b> and Surrounding Region
Bainbridge Island, WA	Healthy and Attractive <b>Community</b>	Provides <b>Connected</b> Transportation and Communications Networks to Ensure Accessibility throughout the <b>Community</b>
Bainbridge Island, WA	Reliable Infrastructure and <b>Connected</b> Mobility	Keeps Citizens <b>Connected</b> and Informed, Ensuring a Reliable Communications Network, and Leveraging Opportunities to

Showing 1 to 56 of 56 entries (filtered from 2,099 total entries)

Previous

1

Next

# Result Setting and Citizen Engagement

# Survey 1: Creating “Results”

- **Concept:** participants in this survey provide their perspective and opinion on the role of local government in your community. What is the purpose of local government? Towards what end results are your programs and services provided? This survey allows each participant to offer their point of view on what the role of local government should be in your community, by thinking about the purpose of the programs you offer.
- **Time Commitment:** survey should take participants 15-30 minutes to complete

## Priority Based Budgeting: Identifying the Role of Local Government

What is the purpose of local government in your community? Why are you relevant in the lives of your citizens, your residents and visitors? Your answers to the following survey questions will help clarify the vital role that your organization serves, as a provider of Results.

In your opinion, what is the role of your local government, as a provider of services in your community?

[illegible]



# Survey 2: Defining “Results”

- **Concept:** participants in this survey are to select and rank the key indicators that lead to the successful accomplishment of each of your Results. Some indicators may be far more influential towards the achievement of your Results than others, and some indicators may not be relevant at all - in this exercise, the participants are able to influence how your Results are defined, shaping the evaluation criteria against which programs are evaluated.
- **Time Commitment:** survey should take participants 20-30 minutes to complete

\* **Safe Community** - rank and prioritize among the key indicators of success for this Result


⋮	<input type="text"/>	...provides safe travel and mobility	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...reduces crime	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...is prepared to respond to emergencies	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...protects property	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...enforces the law	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...protects the environment	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...ensures safe air and access to drinking water	<input type="checkbox"/> N/A

\* **Transportation and Infrastructure** - rank and prioritize among the key indicators of success for this Result

⋮	<input type="text"/>	...promotes efficient and coordinate sewer and water system	<input type="checkbox"/> N/A
⋮	<input type="text"/>	...provides convenient access	<input type="checkbox"/> N/A

# Program Scoring and Peer Review

example: Economic and Business Development



Program Overview

Cost & Revenue

Cost Breakdown

Program Metrics

PBB Quartile: 1

Program: Residential Inspections

Total Cost: 440,208

Program Description

Inspect residential building, zoning, floodplain, damage, electrical, heating, ventilation, air conditioning, pressure piping, boiler, demolition, property code compliance and type A daycares work for minimum code compliance.

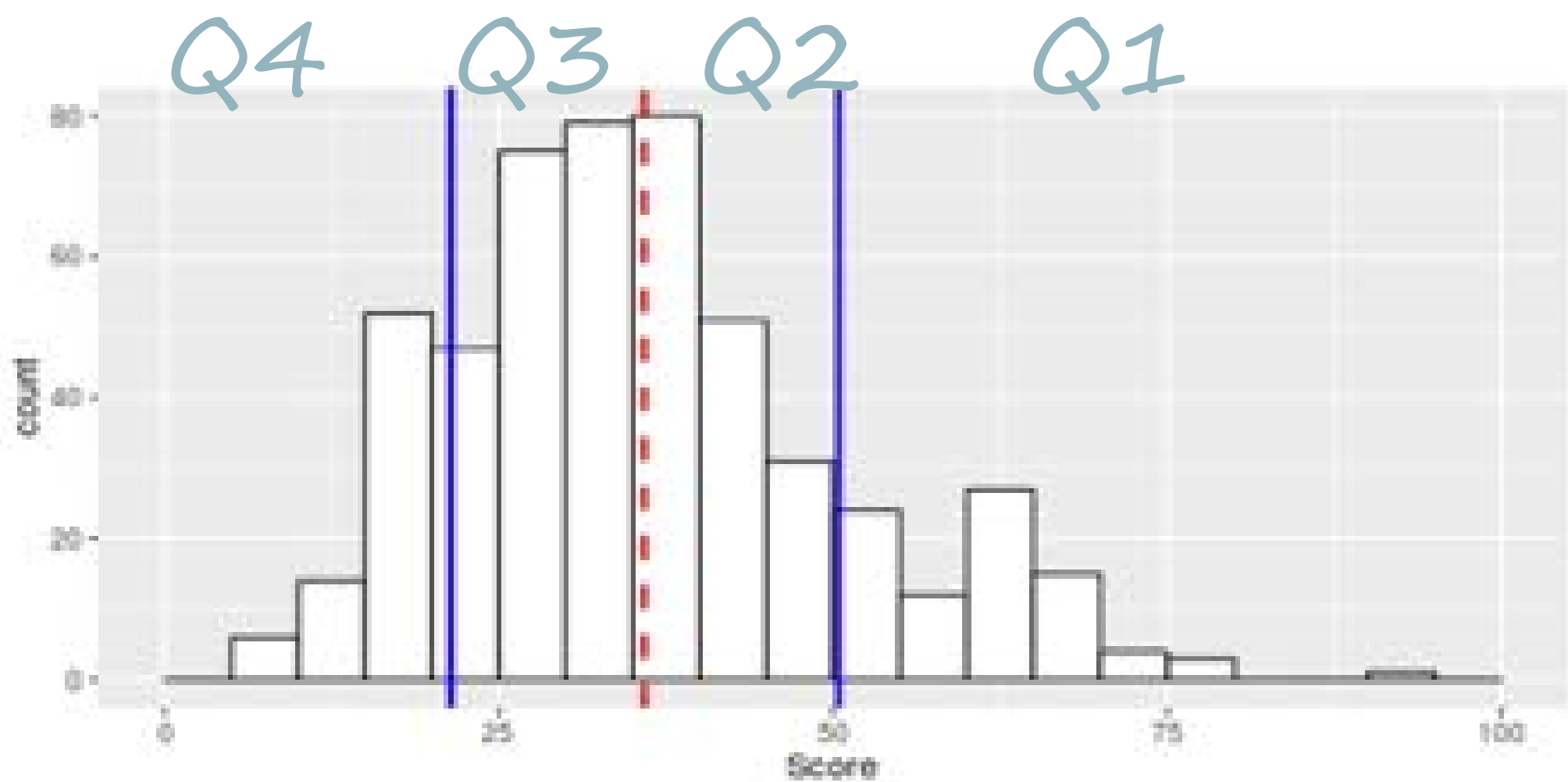
Basic Program Attributes			Alignment with Results	
Attribute	Score	Definition	Result	Score
Mandate	2	Internally Required by Code, Ordinance, or Policy	Community Well-Being	4
Reliance	2	Currently offered by other public, private providers	Safe Community	4
RecoveryCost	4	Fees generate 75% to 100% cost recovery	Strong Economy	4
Demand	4	Change in demand is substantial	Neighborhoods	3
PopServed	3	Substantial portion, at least 75% of the Community	Environmental Sustainability	0
			Transportation and Infrastructure	0

# Program Prioritization

# Relative Quartile Groupings

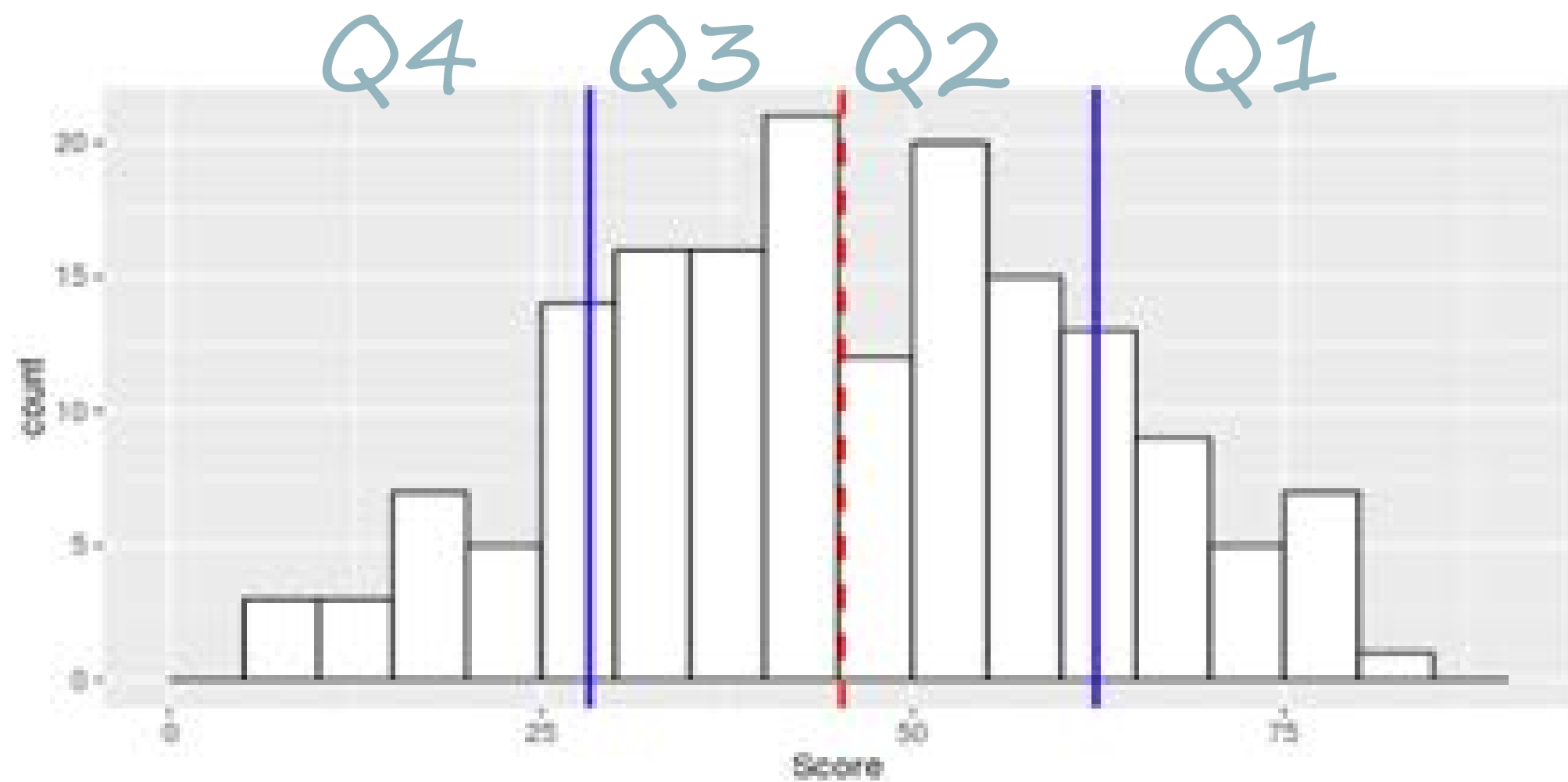
Community Programs - Scoring and Distribution

Rank	Number	Min Score	Max Score	Avg. Score
Q1	128	44.79	90.62	56.1
Q2	154	33.33	43.75	37.89
Q3	167	20.83	32.29	27.14
Q4	72	5.21	19.79	16.12
Totals	521	5.21	90.62	35.91

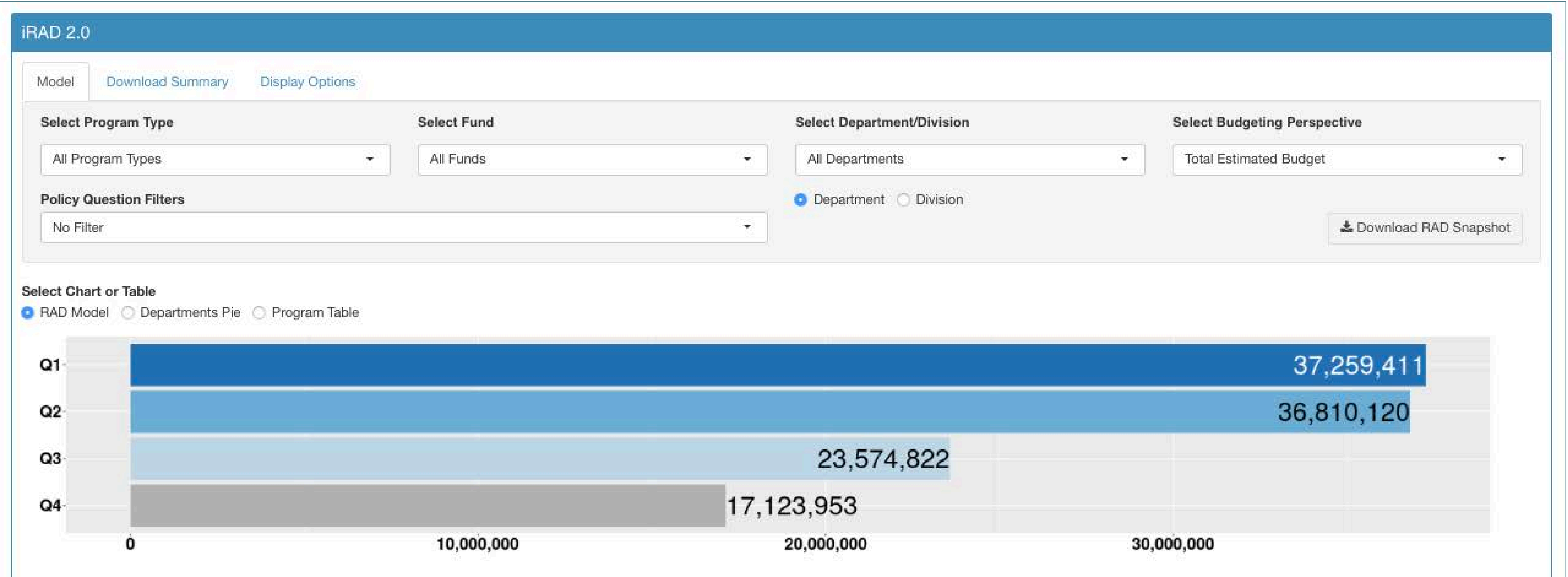


Governance Programs - Scoring and Distribution

Rank	Number	Min Score	Max Score	Avg. Score
Q1	50	55.21	82.29	65.25
Q2	53	40.62	54.17	47.45
Q3	37	27.08	39.58	34.01
Q4	27	7.29	26.04	19.41
Totals	167	7.29	82.29	45.27



# Allocate Resources based on Priorities



# 4 Software Applications to Drive PBB Culture

## 1.) For Super Users: OnlinePBB.net

LOGIN

2017

ANALYSIS TOOLPACK

REPORTS

MODEL EDITOR

MODEL MAKER

EDIT USERS

Add and Remove Users

Add/Remove

Add User:

New User: Must use valid email

Password

First Name

Last Name

Add User

Remove User:

Delete User(uid)

select user id (uid)

Delete User

OnlinePBB Access and Permissions

PresentPBB

DashPBB

OnlinePBB

Table Summary

Access to PresentPBB.net

aaron.daul@co.washington.wi.us

jack.rettler@co.washington.wi.us

Jamie.Ludovic@co.washington.wi.us

joshua.schoemann@co.washington.wi.us

kathie.wild@co.washington.wi.us

margaret.hamers@co.washington.wi.us

Add All >>

Access to OpenPresent

aaron.daul@co.washington.wi.us

jack.rettler@co.washington.wi.us

Jamie.Ludovic@co.washington.wi.us

joshua.schoemann@co.washington.wi.us

kathie.wild@co.washington.wi.us

margaret.hamers@co.washington.wi.us

Add All >>

## 2.) For Elected Officials: PresentPBB.net

LOGIN

PRIORITY BASED BUDGETING

RESOURCE ALIGNMENT

DOWNLOAD

resourceX PresentPBB

Spending on Results

Program Type

StackedBar/Pie

Results Drilldown

Select a Department

Select a Result

Strong Contribution Spending

SAFETY

SOCIO-ECONOMIC

INFRASTRUCTURE

ECONOMY

Human Services

Highway

## 3.) For Departments: DashPBB.net

LOGIN

2018

Community Development

RESOURCE ALIGNMENT

MODEL EDITOR

resourceX DashPBB

Resource Alignment

Department

Line Item Budget

PBB Budget

Program Cost

Fixed Cost

Community Development

1,060,910

1,060,910

1,060,910

0

DrillDown

Multi-Year

Costs & Revenue

Percentage Pies

Table

Cost Analyzer

Quartile

Q1

\$497,096

Q2

\$436,814

Q3

\$89,872

Q4

\$37,128

All Program Types

All Community Programs

All Governance Programs

Fund

Department

Division

Budget Perspective

Program

Results

Result Score

Mandate

Reliance

Recovery Cost

Demand

Population Served

Aligned with Results

## 4.) For Citizens: OpenPBB.net

PBB MAP

2017

PRIORITY BASED BUDGETING

RESOURCE ALIGNMENT

DOWNLOAD

LongmontPBB

Priority Based Budgeting - Local and across the US

What is Priority Based Budgeting?

Priority based budgeting is a best practice as recognized by the International City Managers Association (ICMA) and the Government Finance Officers Association (GFOA).

Click through the tabs above to learn more about Longmont, CO's Priority Based Budget.

The maps below identify local governments that have also adopted Priority Based Budgeting (PBB). Often these communities have posted additional information on PBB on their websites. Clicking on the pins will take you to their pages where you can find more information on PBB.

Longmont, CO

Boulder, CO

Shawnee, KS

Kalamazoo, MI

Los Angeles

San Francisco

San Jose

San Diego

San Antonio

Fort Collins

Longmont, CO

Boulder, CO

Shawnee, KS

Kalamazoo, MI

Los Angeles

San Francisco

San Jose

San Diego

San Antonio

Fort Collins



Questions, Comments?

