The 2022 ResourceX Annual Summit - August 10-12
Denver, Colorado

| Four Square Ballroom | Red Rover Room | Hopscotch Room |

Wednesday, August 10

Conference Schedule

Time		Four Square Ballroom	Red Rover Room	Hopscotch Room
8:00 am - 9:00 am	Coffee & Breakfast	Registration		PBB Micro-Certification (Module 1)
9:00 am - 10:30 am		*Opening Address: Chris Fabian, ResourceX* *Accelerating Impact with 21st Century Budgeting Transformation*		
10:45 am - 11:45 am		*Budgeting for Climate: Why Should you Care?* *Angie Fyfe, ICLEI USA*	*Round Table PBB Strategy Coffee Talk* *ResourceX*	(start time 10:40 am) PBB Micro-Certification (Module 2)
12:00 pm - 1:15 pm	Lunch	*Game Changers: Building Your Budget for the Big Picture* *Chris Fabian, ResourceX*		
1:30 pm - 2:30 pm		*The New Strategy Behind Strategic Budgeting* *Katie Ludwig, GFOA*	*Achieving Your Sustainability and Climate Ambitions* *Grant Ervin, S&B Construction & Angie Fyfe, ICLEI-USA*	(Starts at 1:20 pm) PBB Micro-Certification (Module 3)
2:45 pm - 3:45 pm	Afternoon Snack	*Redefining Risk* *Nick Kittle, Sustainovation*	*Approving and Applying Programmatic Initiatives in Your Community* *City of Salt Lake City*	
4:00 pm - 5:00 pm		Keynote: William Peduto, President Sabean Innovation Former Mayor, City of Pittsburgh From Steel City to Sustainability, the Pittsburgh Story		
5:00 pm - 6:30 pm		Opening Reception		

Thursday, August 11

Time		Four Square Ballroom	Red Rover Room	Hopscotch Room
8:00 am - 9:15 am	Coffee & Breakfast			PBB Micro-Certification (Module 4)
9:30 am - 10:30 am		*Program Budgeting: Why Now and Why Do We Need It?* *Shayne Kavanagh, GFOA and Chris Fabian, ResourceX*		(Starts at 9:25 am) PBB Micro-Certification (Module 5)
10:40 am - 11:35 am		*What It Takes to Create Success like the Pittsburgh Story* *Grant Ervin, S&B Construction & Patrick Cornell, City of Pittsburgh*		PBB Micro-Certification (Module 6)
11:45 am - 12:45 pm	Lunch	*ResourceX Keeps Leveling Up and Changing the Game* *Chris Fabian, ResourceX*		
1:00 pm - 2:00 pm		*Accelerating Impact through What Works Cities Certification and Data-Driven Decision Making* *Emily Ferris, Results for America*	*Building Financial Foundations for Thriving Communities* *Katie Ludwig, GFOA*	*Incredible Insights Make for Actionable Futures* *ResourceX*
2:15 pm - 3:30 pm	Afternoon Snack	*How public private partnerships can support an equitable recovery and strengthen cities.* *Anjali Chainani, Anavi Strategies*		**OnlinePBB Demo & Q&A** **ResourceX**
3:40 pm - 5:00 pm		Keynote: Mark Funkhouser, President Funkhouser & Associates Former Mayor, City of Kansas City Creating and Leading an Anti-Fragile Organization		
5:30 pm - 7:30 pm		**Mastery Awards Ceremony and Celebration**		

		Friday, August 12		
8:00 am - 9:00 am	Coffee & Breakfast			
9:00 am - 10:30 am		*Rethinking Budgeting* *Shayne Kavanagh, GFOA; Katie Ludwig, GFOA and* *Chris Fabian, ResourceX*		*Climate Change 101* *Angie Fyfe*
10:40 am - 11:45 am		*Applying Needs Assessments to Your Program* *Insight Process* *Anjali Chainani, Anavi Strategies*		*A Better Budget is Not a More Complex Budget:* *Budgeter in Action* *ResourceX*
12:00 pm - 1:00 pm	Lunch	*How Can You Accelerate Impact in Your Community* *Chris Fabian, ResourceX*		

	Session Guide

Wednesday, August 10

Four Square Ballroom

IMPACT

Session Overview:
Speaker(s): Chris Fabian, ResourceX
Location: Four Square
Time: 9:00 am - 10:30 am

Accelerating Impact with 21st Century Budgeting Transformation

The budget is one of the most powerful tools for influencing change. By applying data and evidence, and using program-level data and insights as your guide, you can repurpose and reprogram your organization to achieve foundational results, equity, and climate-focused community outcomes, and thrive.

2022 has been an incredibly exciting year for the Priority Based Budgeting Community: OnlinePBB migrated to a new platform, GFOA is leading the "Rethinking Budgeting" efforts, ICMA launched a PBB micro-certification, the ResourceX Mastery Award Winners achieved monumental successes in their communities, the ResourceX team grew three-fold, OnlinePBB Budgeter launched to allow for a true program budgeting experience, and maybe most importantly, we are all gathering back together for the first time in since Summit 2019!

CLIMATE ACTION

Session Overview:
Speaker(s): Angie Fyfe, ICLEI USA
Location: Four Square
Time: 10:45 am - 11:45 am

Budgeting for Climate: Why Should you Care?

ICLEI Executive Director Angie Fyfe will discuss how local governments are tackling climate action and pursuing sustainability by inventorying emissions and community carbon footprints, identifying strategies to target net zero emissions (from fleet electrification to facility retrofits) and prioritizing budget to fund solutions, including regional coordination. She will address the changing requirements for state and local government budget offices and why it is important for everyone to understand climate budgeting practices, then she will open up the session for interactive Q&A.

BUDGET TRANSFORMATION

Session Overview:
Speaker(s): Chris Fabian, ResourceX
Location: Four Square
Time: 12:00 pm - 1:15 pm

Game Changers: Building Your Budget for the Big Picture

ResourceX is working with our Priority Based Budgeting (PBB) Communities to move beyond outdated systems to achieve a true program-based budget solution within OnlinePBB and advance local government thinking beyond the traditional approach to budgeting. With OnlinePBB Budgeter, we have created a new pathway to achieve budget transformation recognizing the power and potential of program and priority based budgeting data. In 2022 the City of Flagstaff Built their Budget for the Bigger Picture by using OnlinePBB Budgeter to build their proposed 2022-2023 budget. Building their budget at the program level enabled staff and council to consider each funding request through the lens of their Carbon Neutrality Plan (CNP) ultimately identifying over $2Million in new CNP investments!

BUDGET TRANSFORMATION

Session Overview:
Speaker(s): Katie Ludwig, GFOA
Location: Four Square
Time: 1:30 pm - 2:30 pm

The New Strategy Behind Strategic Budgeting

The problem is that historically the budget has been driven by accounting needs. We need a way to categorize the budget that allows and encourages conversations about how to prioritize values and outcomes. How can local governments translate between the "what" (line items) and the "why/what for" (strategies/tactics/programs).

RECOVERY

Session Overview:
Speaker(s): Nick Kittle, Sustainovation
Location: Four Square
Time: 2:45 pm - 3:45 pm

Rewiring Risk: Getting Our Head on Straight

Are the things we spend our time on are truly important? What is the real nature of risk? Do you know success and failure when you see it?

In this intriguing keynote, Nick will explain the ways our brains play tricks on us, designed to keep us stuck in the muck, and unpack the nature of true risk: the way we've always done it. Don't rock the boat. Don't expect more. Pretty good is good enough.

Not any more. Nick will guide attendees through his personal story of risk, his innovation journey and connect attendees with how we can reframe our thinking to make a meaningful impact for our personal lives and our work lives right now. Attendees will walk out ready to tackle challenges with renewed hope and excitement for what lies ahead.

Session Overview:
Speaker(s): William Peduto, Sabean Innovation
Location: Four Square
Time: 4:00 pm - 5:00 pm

From Steel City to Sustainability, the Pittsburgh Story

Serving as the Mayor of the City of Pittsburgh from 2014 – 2022, Mayor Peduto led the repositioning of the city from an environmentally and fiscally challenged city to one of financial health, climate leadership and leadership in wrestling with decades of social inequality. Many communities of all sizes face these same challenges and recognize the need to address them, but fail to recognize their power and capacity to do so. Local governments cannot afford to be beholden to the status quo of municipal management; the stakes are too high. Municipalities must use data and reframe the discussion. ResourceX was a critical part of this journey and the City of Pittsburgh's ability to plan, prioritize and recognize its financial capabilities to invest in the challenges of climate and inequality.

Red Rover Room

Session Overview:
Speaker(s): ResourceX
Location: Red Rover
Time: 10:45 am - 11:45 am

Round Table PBB Strategy Coffee Talk

Join ResourceX for a strategy session all about you. Whether you are considering PBB, involved in implementation, or a seasoned pro looking for some helpful direction and guidance, the ResourceX team will be there to listen and support you. Come with questions or just come to listen and learn from others.

Session Overview:
Speaker(s): Grant Ervin, S&B Construction and Angie Fyfe, ICLEI USA
Location: Red Rover
Time: 1:30 pm - 2:30 pm

Achieving Your Sustainability and Climate Ambitions

Creating a climate action plan and funding that plan are two different challenges municipalities try to tackle. Establishing goals that are meaningful and measurable in your community is something that local governments stand to achieve with far greater success than other levels of government. To fund those initiatives requires excellent communication and cooperation at all levels within that local government.

Session Overview:
Speaker(s): City of Salt Lake City
Location: Red Rover
Time: 2:45 pm - 3:45 pm

Approving and Applying Programmatic Initiatives in Your Community

Salt Lake City launched their program budgeting work with ResourceX as a part of the Results for America City Budgeting for Equity and Recovery (CBER) initiative in the spring of 2021. The city piloted their program budgeting initiative across their Finance and Police Departments. This work was done as part of the Racial Equity in Policing Commission. The Commission on Racial Equity in Policing was formed to examine SLCPD's policies, culture, and budget and any City policies that influence SLCPD's culture or policies.

Through the leadership of Salt Lake City CFO Mary Beth Thompson and Budget Director John Vyuk (and budget analysts across Finance and Police Departments), the city developed a Program Budget across both departments. Through this effort, the city has developed a powerful new program level data set that identifies the programs the city delivers, the true cost of program delivery, and programmatic alignment with specific outcomes such as equity and sustainability. And ultimately, this initiative produced multiple new program specific budget proposals with the intention of better aligning Police programs with equity goals as identified by the Racial Equity in Policing Commission.

Hopscotch Room

Session Overview:
Speaker(s): ResourceX
Location: Hopscotch
Time: 8:00 am - 9:00 am

ICMA PBB Micro-Certification - 21st Century Budgeting

Module 1: High level overview of the skills local government leaders will need to master in order to budget effectively in the 21st Century, according to ICMA.

Session Overview:
Speaker(s): ResourceX
Location: Hopscotch
Time: 10:45 am - 11:45 am

ICMA PBB Micro-Certification - Communication

Module 2: Identify the programs you offer, and the price for delivering each program via program-based budgeting. Further layer data such as community outcomes, and even performance metrics to add insight as to the alignment (or lack thereof) of your organization's resources with the results you're striving to achieve. Communicate this information. Use it as the basis for budgetary decisions.

	Session Overview:	**ICMA PBB Micro-Certification - Resource Optimization**
	Speaker(s): ResourceX	Module 3: Take action on the data produced via program-based, priority-based and/or performance-based budgeting. Shift resources away from programs that can be provided more efficiently for the same outcome, programs that are less relevant and could be provided at a lower service level (or sunset), programs that are performing poorly, or programs that could be provided with a partner, and repurpose those resources towards new programs that need to be launched, or current programs that need enhancement. Also, seek to maximize incoming resources through cost-recovery opportunities shown in the data, regionalization and in-sourcing opportunities, grant funding, opportunity zones, economic development, philanthropic commitments, and taxation.
	Location: Hopscotch	
	Time: 10:45 am - 11:45 am	

Join ResourceX for a reception celebrating our community. Enjoy drinks and snacks while mingling with peers, colleagues, session leaders, and the ResourceX team.
Four Square Ballroom and Patio
5:00 pm - 6:30 pm

Thursday, August 11

Four Square Ballroom

	Session Overview:	**Program Budgeting: Why Now and Why Do We Need It?**
	Speaker(s): Shayne Kavanagh, GFOA and Chris Fabian, ResourceX	Local governments have developed their budgets in essentially the same way for decades. There have been criticisms of traditional budgeting processes for just as long. Shayne and Chris wrote a paper in 2015, The Promise and Challenges of Program Budgeting, stating the benefits of program budgeting. It hasn't been forgotten since then. So why are we still talking about program budgeting? Why is it still relevant? And why should local governments consider it today?
	Location: Four Square	
	Time: 9:30 am - 10:30 am	

	Session Overview:	**What It Takes to Create Success like the Pittsburgh Story**
	Speaker(s): Grant Ervin, S&B Construction & Patrick Cornell, City of Pittsburgh	The budget is an incredibly powerful tool to leverage for change. Integrating climate considerations into operating and capital budgeting decisions across the organization strengthens resource alignment with Climate Action Plans. The application of program-level data through Priority Based Budgeting provides direct alignment between fiscal decision-making and climate action goals. It gives the additional advantage of increased transparency and agility within the budgeting process by creating a shared language that connects departments to the finance and budgeting process.
	Location: Four Square	
	Time: 10:40 am - 11:35 am	

	Session Overview:	**ResourceX Keeps Leveling Up and Changing the Game**
	Speaker(s): Chris Fabian, ResourceX	Our software is built with the same focus as our Summit - to catalyze and accelerate impact in communities across the continent with realistic, tangible 21st century budget strategies. Real issues are being tackled every day related to budget transformation, equity improvements, climate resilience, and financial recovery in an ever-changing and complex landscape. The ResourceX software is built to help! Come see how we are continuing to enhance our software to make PBB data visualization and analysis as easy as ever to take action on the issues that matter most.
	Location: Four Square	
	Time: 11:45 am - 12:45 pm	

	Session Overview:	**Accelerating Impact through What Works Cities Certification and Data-Driven Decision Making**
	Speaker(s): Emily Ferris, Results for America	In this session, participants will learn how the incorporation of data-driven decision-making across processes can sustainably improve a city's fiscal health. Emily Ferris, Senior Manager of What Works Cities Certification at Results for America (RFA), will share the advantages of benchmarking how well cities are managed, whether they have the right people, policies, and processes in place to put data and evidence at the center of decision-making. RFA Senior Advisor, Anjali Chainani, Founder and Principal of Anavi Strategies, will share tools and tactics, such as reimagining procurement and approaches to capital improvement projects, that leaders are using to improve city finances while advancing equity at the systemic level.
	Location: Four Square	
	Time: 1:00 pm - 2:00 pm	

	Session Overview:	**How public private partnerships can support an equitable recovery and strengthen cities**
	Speaker(s): Anjali Chainani, Anavi Strategies, Laura Solano, City of Pueblo, Shayne Kavanagh, GFOA	The COVID-19 pandemic had a rapid impact on the U.S. economy, and on local and state governments. City government capacity in particular has been seriously diminished by the pandemic, leadership turnover, and related challenges. Many private, non-profit, and institutional actors have capacity, technical skills, and resources to offer to help government leaders advance equity in budgeting. City officials can utilize the additional capacity to identify discrete projects, and match their project needs with external support. This presentation will elevate examples where public, private, non-profit and institutional partnerships are helping to advance equity in local government. After attending this presentation, participants will have gained a deeper understanding into how an expanded group of civic and government leaders can support an equitable recovery and strengthen cities as places to live and work.
	Location: Four Square	
	Time: 2:15 pm - 3:30 pm	

	Session Overview:	**Creating and Leading an Anti-Fragile Organization**
	Speaker(s): Mark Funkhouser, Funkhouser & Associates	The concept of anti-fragile leadership is rooted in the notion that organizations not only can recover but improve when they grapple with adverse events. In essence, they show resilience, but also the agility to adapt and improve based on new insights. On one end of the spectrum, a fragile organization is vulnerable to disruption and breaks easily. Becoming resilient means the organization is able to rebound in the face of disruptive events. It is strong, hard to knock off stride, and able to carry out its mission. An anti-fragile organization is a step beyond that: It's flexible and changes its shape and structure as it responds to stressors. It gets stronger and smarter, better equipped to anticipate novel challenges and navigate uncertainty. Mark will explore how leaders can communicate and collaborate with their teams and across departments to cultivate antifragility.
	Location: Four Square	
	Time: 3:45 pm - 5:00 pm	

Red Rover Room

Building Financial Foundations for Thriving Communities

Session Overview:
Speaker(s): Katie Ludwig, GFOA
Location: Red Rover
Time: 1:00 pm - 2:00 pm

Financial Foundations for Thriving Communities was published by GFOA as an overarching blueprint for financial excellence. Hear from GFOA's Katie Ludwig how the Priority Based Budgeting methodology aligns with GFOA's pillars of Financial Foundations, and how your community can achieve GFOA's mark of excellence by way of implementing PBB.

Hopscotch Room

ICMA PBB Micro-Certification - Achieve Results

Session Overview:
Speaker(s): ResourceX
Location: Hopscotch
Time: 8:00 am - 9:10 am

Module 4: With mastery over resource reallocation techniques, re-imagine what outcomes you'd set out to achieve if resources weren't the limiting factor. Freed from the restriction of the perception "we don't have the money" or "we don't have the staff" or "we don't have the partners" to launch the programs you'd desire to launch to create a better future, what programs would you launch? What outcomes would you seek? Seek to establish ambitious goals that provide for a higher quality of life for everyone..

ICMA PBB Micro-Certification - Collaborate

Session Overview:
Speaker(s): ResourceX
Location: Hopscotch
Time: 9:25 am - 10:30 am

Module 5: The limitation of "Level 2" and "Level 3" is that your organization will reach a limit, a state of optimization where there are no more advantageous trade-offs left to consider. Not that an organization has to wait until this point of optimization to pursue "Level 4" whatsoever, but the idea here is to leverage and partner with other service providers who are aligned in their work with the results your organization is striving to achieve, and take advantage of their efforts, their resources, as if your organization and theirs were one and the same. Massive regional resource optimization can be achieved via Program Mapping and entails understanding what other organizations provide, and where it would be advantageous for your organization to opportunistically outsource various programs (leveraging other entities who can provide them just as well, or retire them altogether), regionalize to jointly provide programs together (public-private partnerships, or merged services provided more efficiently together), or entrepreneurially in-source programs to maximize incoming resources.

ICMA PBB Micro-Certification - Incorporate

Session Overview:
Speaker(s): ResourceX
Location: Hopscotch
Time: 10:40 am - 11:45 am

Module 6: Create budget requests at the program level with built-in cost and program data to serve as a fully built decision package. Programs increase accessibility and communicability between organizational staff and elected officials tasked with understanding requests and making decisions. Each programmatic budget request includes the nature of the program change and the resulting impact(s) of that change. The program budget request comes with both financial and strategic alignment information.

Incredible Insights Make for Actionable Futures

Session Overview:
Speaker(s): Jackie English, ResourceX
Location: Hopscotch
Time: 10:40 am - 11:35 am

Program Insights facilitate communication and collaboration that help organizations to take action on their programs and services. The "Insight" process is what led Pittsburgh to identify $41 million resource reallocation. Learn how to create Insights in your organization. Insights offer organizations an opportunity to use PBB data and intuition to enact small changes that deliver a big impact. They offer an organization their best opportunity to work in a collaborative and proactive fashion to build a sustainable future. Insights utilize the wisdom of the crowd and their expertise to design the future of their programs and services.

OnlinePBB Demo and Q&A

Session Overview:
Speaker(s): Brad Steckart, ResourceX
Location: Hopscotch
Time: 2:15 pm - 3:30 pm

OnlinePBB is the software solution to transform your budget process and optimize resources. Learn how our unique software offering can empower your organization to identify the cost of every program you offer and align your budget with the strategic priorities set by elected officials.

The ResourceX Mastery Awards celebrate the organizations in our PBB community who excelled throughout the year in the creation and application of PBB data. Join host, Jane Brautigam and emcee, Chris Fabian for hors d'oeuvres and drinks as they recognize this year's award recipients.
Four Square Ballroom
5:30 pm - 7:30 pm

Friday, August 12

Four Square Ballroom

Session Overview:

Speaker(s): Katie Ludwig, GFOA, Shayne Kavanagh, GFOA and Chris Fabian, ResourceX

Location: Four Square

Time: 9:00 am - 10:30 am

BUDGET TRANSFORMATION

Rethinking Budgeting

Local governments have long relied on incremental, line item budgeting where last year's budget becomes next year's budget with changes around the margin. Though this form of budgeting has its advantages and can be useful under circumstances of stability, it also has important disadvantages. The primary disadvantage is that it causes local governments to be slow to adapt to changing conditions. The premise of the Rethinking Budgeting initiative is that the public finance profession has an opportunity to update local government budgeting practices to take advantage of new ways of thinking, new technologies, and to better meet the changing needs of communities. This body of work describes why Rethinking Budgeting is necessary and what you can expect from the Rethinking Budgeting initiative in the future.

Session Overview:

Speaker(s): Anjali Chainani

Location: Four Square

Time: 10:40 am - 11:45 am

EQUITY

Needs Assessments as a Tool to Advance Equity in Budgeting

This presentation will elevate how government leaders and staff can develop and use needs assessments as a tool to advance equity in budgeting. A needs assessment may take many forms that range from informal to formal, but all needs assessments have a set of common characteristics. Whether for new programs or existing programs, a needs assessment can help governments better understand what a community's needs are, and ensure subsequent legislative and budgetary actions are in line with needs that are expressed by the community. After attending this session, participants will be able to develop their own needs assessment tool to understand and further apply how they align budgetary investments with resident and program needs.

Session Overview:

Speaker(s): Chris Fabian, ResourceX

Location: Four Square

Time: 12:00 pm - 1:00 pm

IMPACT

How Can You Accelerate Impact in Your Community

Red Rover Room

Session Overview:

Speaker(s): ICLEI USA

Location: Red Rover

Time: 9:00 am - 10:30 am

CLIMATE ACTION

Climate Change 101

Session Overview:

Speaker(s): ResourceX

Location: Red Rover

Time: 10:40 am - 11:45 am

BUDGET TRANSFORMATION

A Better Budget is Not a More Complex Budget: Budgeter in Action

Budgets are how cities truly express their priorities. Traditional budgets track line items across departments, such as postage and paper. But they don't organize line items by program or activity, making it challenging to understand where each line item goes. Traditionally, departmental budget requests would identify line items to increase or decrease. With the priority-based program budget, each request can be tied to defined programmatic outcomes and detailed information based on achieving an organization's goals.