FUELING RESOURCES TOWARD THE RESULTS OF TOMORROW
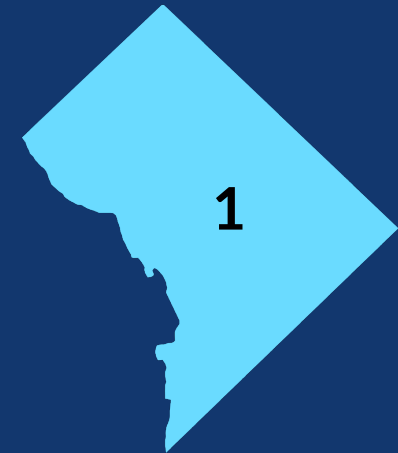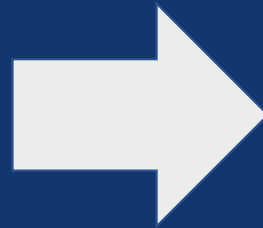
CONNECT THE BUDGET TO THE VISION AND VALUES OF YOUR COMMUNITY

ICMA | **resourceX**
reprogram your organization
www.resourcex.net

PARTICIPANT GUIDE

When you see this icon, go to that page in your Participant Guide.

01

21ST CENTURY BUDGTING

02

COMMUNICATE

03

OPTIMIZE RESOURCES

04

ACHIEVE RESULTS

05

COLLABORATE

06

INCORPORATE PBB

PROGRAM JOURNEY

LEARNING JOURNEY

01 In the Real World

02 Tackling Society's Biggest Issues

03 Reframing the Budget Process

04 Proficiency and Mastery

DISCUSSION

IF LOCAL GOVERNMENT DOESN'T ADDRESS IT, WHO WILL?

From Module 3:
What is one major initiative important to your community that falls into the category of "if only we had more resources"?

- Are there other public entities, non-profits, or private companies investing in solutions?

- Is your organization currently investing in solutions?

- Do you know how many of your current services ARE contributing to that initiative?

- Do you know how many of your current services COULD contribute to that initiative?
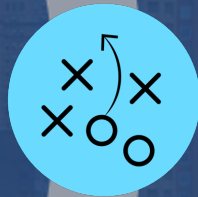
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IN THE REAL WORLD

EQUITY
DENVER, CO

GOAL

- Solve the organizational disconnect between budget requests and equity goals

PATH TO ACTION

- Use program insights to identify programmatic opportunities to enhance equity

SKILLS AND CAPACITY

- Create a program inventory
- Define equity in your organization and community
- Align program futures through the lens of your equity definition

EQUITY
DENVER, CO

PROGRAM NAME

IMPOUND LOT

INSIGHT OPPORTUNITY

INCREASE EQUITY

INSIGHT RECOMMENDATION

RECONSIDER (AND FORGIVE) FINES THAT STAND IN THE WAY OF ECONOMIC OPPORTUNITY

DENVER
THE MILE HIGH CITY

PROGRAM NAME

SNOW REMOVAL

INSIGHT OPPORTUNITY

INCREASE EQUITY

INSIGHT RECOMMENDATION

PRIORITIZE WALKABLE PATHWAYS TO BUS STOPS (ECONOMIC ACCESS), GROCERY STORES, CITY SERVICES (LIBRARIES, PARKS, ETC).

DENVER
THE MILE HIGH CITY

CLIMATE
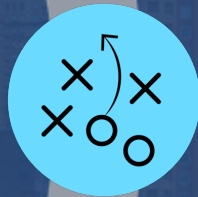## PITTSBURGH, PA

GOAL
- Make changes to programs that influence daily operations to reduce the city's overall climate impact

PATH TO ACTION
- Create program data around which communication and understanding can happen
- Build budget requests utilizing program data to ensure changes are enacted

SKILLS AND CAPACITY
- Create the shared language complete with all the program data
- Invite the knowledge base within the organization to ideate on those programs and make recommendations

CLIMATE
PITTSBURGH, PA

PROCUREMENT
Office of Management and Budget

Total Cost: 6,041,212   **Quartile: 2**

Program Description: Solicit and award contracts for goods and services on behalf of departments; manage p-card system; prepare and administer the Buying Plan; maintain JDE Item master; review purchase orders; maintain Beacon website contract database;.

Personnel Cost: 689,599
NonPersonnel Cost: 5,351,614
Program FTE: 8.3

Demand 2
Mandate 2

Pop Served 4
Reliance 0
Cost Recovery 0

Equivalent to 108 Trees...

1.
Life on Land: Goal #15
Sustainably manage forests, combat desertification, halt and reverse land degradation, halt biodiversity loss.
This Insight and its implementation have already saved 35,862 pounds of wood.

2.
Life Below Water: Goal #14
Conserve and sustainably use water, oceans, seas and marine resources.
This Insight and its implementation have already saved 105,591 gallons of water.

75 Washing Machines...

3.
Climate Action: Goal #13
Take urgent action to combat climate change and its impacts.
This Insight and its implementation have already saved 84,174 pounds of Carbon.

9 Cars...

and 96 trash cans!

4.
Responsible Consumption and Production: Goal #12
Ensure sustainable consumption and production pattern.
This Insight and its implementation have already saved 5,826 pounds of waste.

WHAT WORKS CITIES: CITIES BUDGETING FOR EQUITY AND RECOVERY

What Works Cities | Bloomberg Philanthropies

CITY BUDGETING FOR EQUITY & RECOVERY

TACKLING
SOCIETY'S BIGGEST
ISSUES

WHAT OUTCOME ARE YOU WORKING TOWARDS?

CLIMATE

Resource scarcity and organizational constraints make it difficult to address "new" issues such as Climate Action. But local governments have a unique opportunity to prepare for the impacts of climate change.

HOMELESSNESS, OPIOID CRISIS, FAILING INFRASTRUCTURE...

To what result do we need to align our resources, in order to bring about the future that we dream of?

EQUITY

By establishing a clear equity mission and goals local governments will enter a new era of citizen-focused governance with an equity focus.

COVID RECOVERY

With the American Rescue Plan Act funds providing a massive funding allocation, the way you spend your funds has the potential to impact your community for years to come.

FISCAL SUSTAINABILITY

With no plausible future ahead where local government has all the resources needed to make a high magnitude of reallocation ordinary and regularly achievable.

BUDGETING FOR EQUITY

CITY OF TACOMA, WA

- Clear definition for equity objective with many measurable components

- Requests coming in disconnected from this outcome

- OMB went back to departments with an "appreciative inquiry exercise"

- Modified requests and proposals to move the needle on equity objective

TACOMA, WASHINGTON

TACOMA BY THE NUMBERS

48 Ideas Approved	**$24M** Amount Approved for Equity Impact
10 Insights Approved for Affordable Housing & Homelessness	**18** Departments Participated
$16M Amount Approved for Community Safety	**20** Insights Approved for Organizational Culture

CLIMATE ACTION

600 — Local governments across the US have adopted Climate Action Plans

45% — Largest US cities that have adopted a serious climate pledge

67% — Of those cities have short of their targets outlined in their Climate Action Plans

COVID RECOVERY

TAKOMA PARK, MD

Data-driven budgeting methodology to ensure proposals chosen for ARPA funding would achieve equitable outcomes

PUEBLO, CO

Straightforward, fair, and repeatable process to apply to proposals to ensure equitable distribution across their community

Takoma Park ARPA Scoring Matrix

	Alignment with Council Priorities	Resident Impact*	Cost	Equity Impact**	Internal Impact	Complexity and Measurement	Alternatives
0	Does not align	Impacts less than 25% of our population	$2M+	No urgency or impact benefiting vulnerable populations	Project has negative impacts on the City's ability to deliver services to residents	Project lacks data and evidence to support outcomes, and may be complex	No Evidence of Matching Funding Sources
2	Aligns with 1 or more Council Priorities	Impacts between 25% and 75% of our population, and to a high degree	$500,000 to $2M	Some urgency and impact benefiting vulnerable populations	Project doesn't impact normal service delivery positively or negatively	Project is evidence-based, while some complexity is anticipated	Some Evidence of Matching Funding Sources
4	Aligns with 1 or more Council Priorities, and Prior Planning Efforts	Impacts more than 75% of our population, and to a high degree	$0 to $500,000	High urgency and impact benefiting vulnerable populations	Project has a transformational impact on City operations, including positive secondary effects	Project is evidence-based by data, and minimal in complexity	Clear Evidence of Matching Funding Sources

The City of Pueblo, Colorado
American Rescue Plan Act Scoring Matrix

	Eligibility	Complexity	Cost	Community Benefitting	Equity	Evidence of Sustainability	Due Diligence Companion Funds	Census Track Eligibility (Internal Task Force ONLY)	Infrastructure (Internal Task Force ONLY)
0	Does not meet Treasury guidelines	Highly Complex: Requires 12+ months to implement	$2M+	Less than 25% of Community Benefitting	No impact on Pillar equity goals	No funding identified for multi-year program sustainability	No Evidence of Matching Funding Sources	Does not Meet Census Track Eligibility	Does not align with Federal draft legislation
2	Likely meets Treasury guidelines	Medium Complex: Requires 3-12 months to implement	$500,000 to $2M	26% to 50% of Community Benefitting	Some impact on Pillar equity goals	Possible funding identified for multi-year program sustainability	Some Evidence of Matching Funding Sources	Likely Meets Census Track Eligibility	May align with Federal draft legislation
4	Clearly meets Treasury guidelines	Light Complex: Can be implemented in 3 months or less	$0 to $500,000	Majority of Community (51%+) Benefitting	High impact on Pillar equity goals	Funding has been identified for multi-year program sustainability	Clear Evidence of Matching Funding Sources	Clearly Meets Census Track Eligibility	Likely aligns with Federal draft legislation

*Programs with the highest "score" to be considered as most impactful and of the highest priority
*Sustainability – Defined as "ability to fund program beyond one-time use of ARPA funds"
*Matching Funds – Defined as "other companion funding sources" (ie: Federal, State, Private, Non-profit)

FISCAL SUSTAINABILITY

THE CITY OF DULUTH

BEFORE

Line-item budget with no flexibility for new initiatives or new hires

"Same old, same old" fashion—a deficit meant positions were held vacant

Voluntary cuts or across the board cuts

AFTER

Aligned resources with comprehensive plan

Pivoted to program-based budgeting strategy to determine budget cuts

Shrunk budget gap and ensured success of Imagine Duluth 2035 plan

HOMELESSNESS
In Kalamazoo, MI

Goal: End homelessness and hunger instead of funding homeless shelters and food pantries.

OUTCOMES IN YOUR COMMUNITY

CREDIT RATING
In Scott County, MN

Goal: Incorporate strong revenue and expenditure assumptions in the budget.

REFRAMING THE BUDGET PROCESS

CONTRIBUTE TO CLIMATE ACTION

Vote to approve or deny the line-item budget request based on the data below:

CITY PLANNING ▼	📊 RESOURCE ALIGNMENT Analysis ToolPack

Line Item	Amount	Change
NonPersonnel	300,769	
Administrative Fees	4,500	
Cleaning	3,100	
Computer Maintenance	25,750	**-$1,000**
Employment Related	750	
Grants	25,000	
Office Supplies	22,900	
Operational Supplies	12,050	
Printing & Binding	1,000	
Professional Services	157,325	**+$25,000**
Promotional	3,144	
Recording/Filing Fees	18,500	
Regulatory	1,750	
Workforce Training	25,000	**+$5,000**

TOTAL DEPARTMENTAL REQUEST: $29,000
HOW DOES IT CONTRIBUTE TO CLIMATE ACTION?
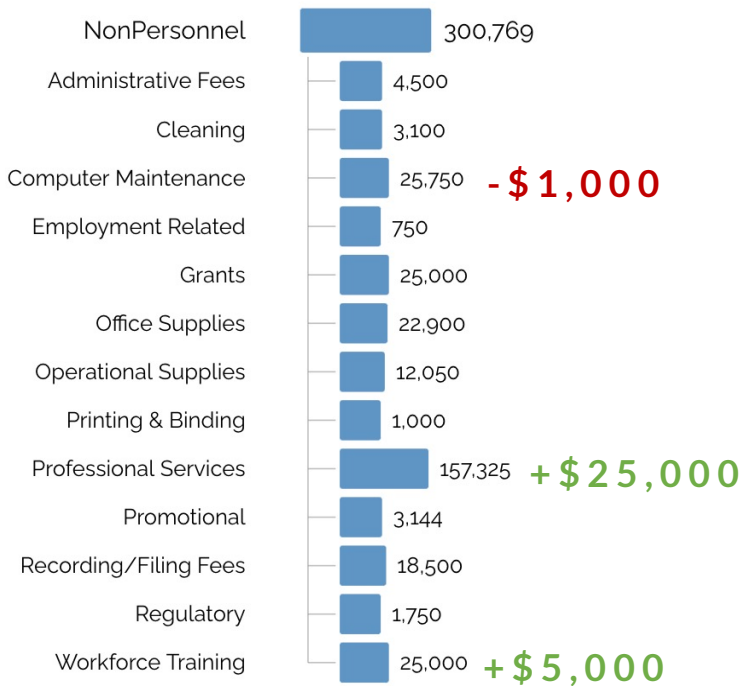
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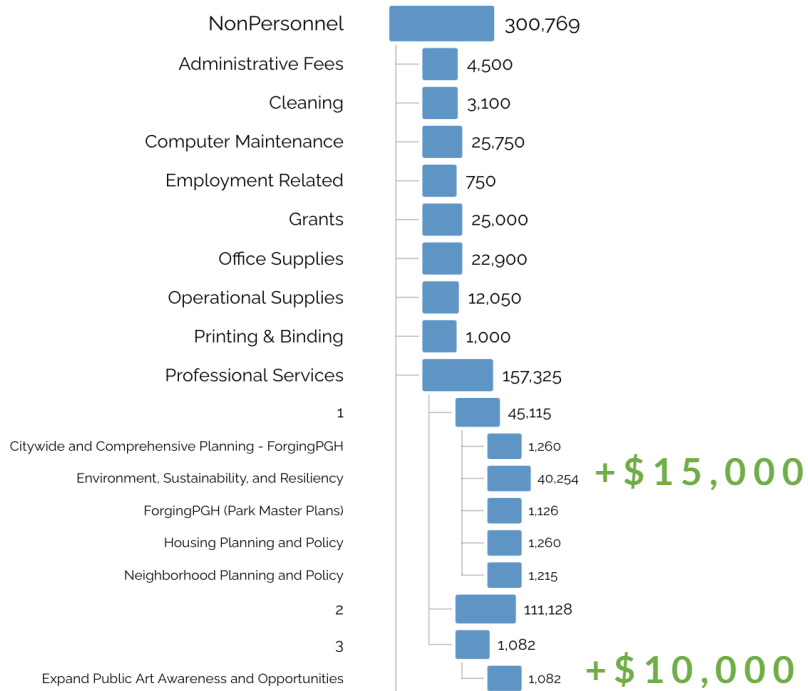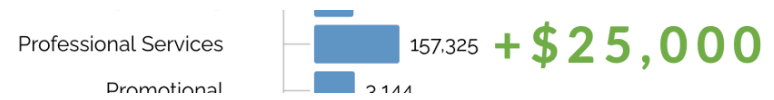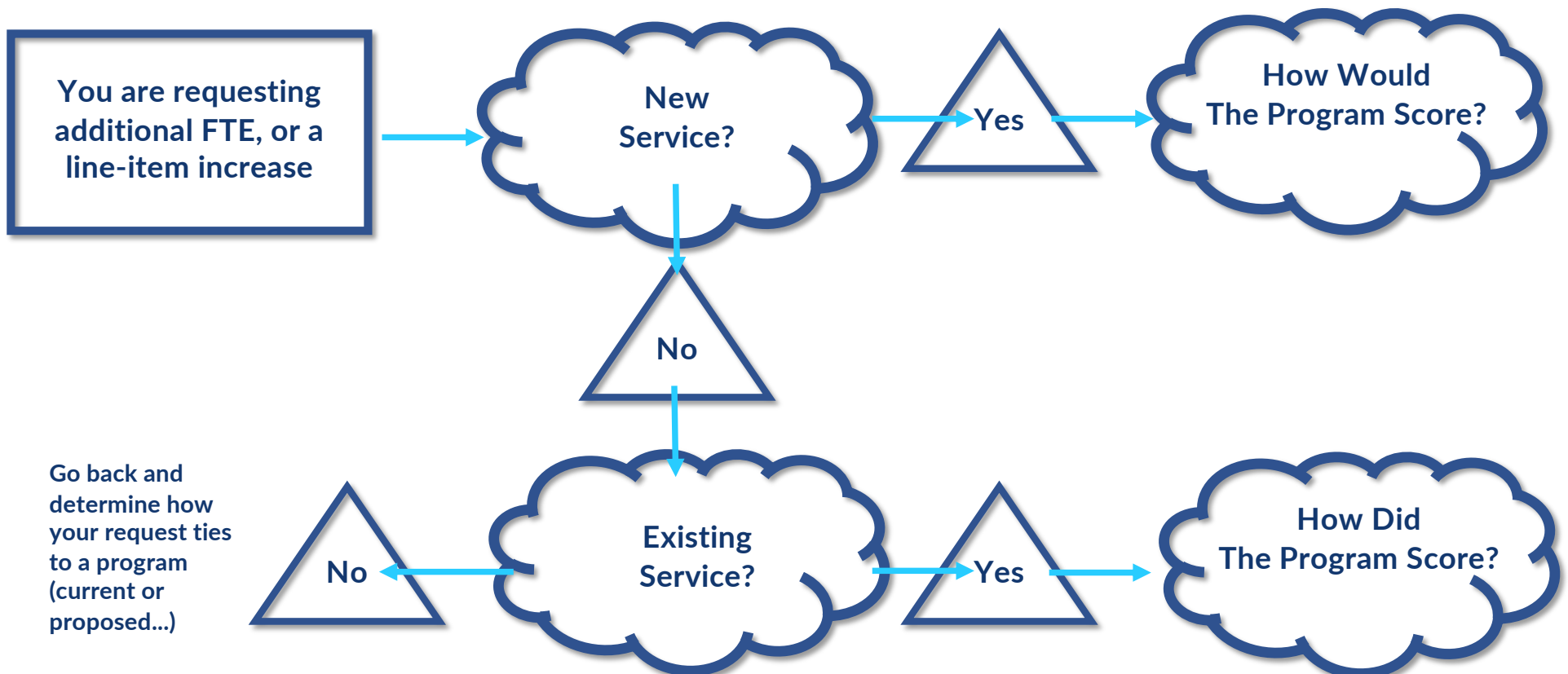
CITY PLANNING ▼ | 📊 RESOURCE ALIGNMENT
Analysis ToolPack

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Computer Maintenance	25,750
Employment Related	750
Grants	25,000
Office Supplies	22,900
Operational Supplies	12,050
Printing & Binding	1,000
Professional Services	157,325
1	45,115
Citywide and Comprehensive Planning - ForgingPGH	1,260
Environment, Sustainability, and Resiliency	40,254
ForgingPGH (Park Master Plans)	1,126
Housing Planning and Policy	1,260
Neighborhood Planning and Policy	1,215
2	111,128
3	1,082
Expand Public Art Awareness and Opportunities	1,082

+$15,000 (Environment, Sustainability, and Resiliency)

+$10,000 (Expand Public Art Awareness and Opportunities)

NOW, WITH THE SAME $25,000 FROM THE PREVIOUS SLIDE...

Professional Services | 157,325 **+$25,000**

Promotional | 2,144

How to Frame New Budget Request(s)

You are requesting additional FTE, or a line-item increase

New Service?

Yes

How Would The Program Score?

BUREAU OF ANIMAL CARE AND CONTROL

Budget Request
- Budget Increase: + 2 FTE, $135,000
- Business Case: growing population of animals in need
- Tie to Climate and Equity: *(insert stretch case here)*

No

Go back and determine how your request ties to a program (current or proposed...)

No

Existing Service?

Yes

How Did The Program Score?

FUELING RESOURCES TOWARDS RESULTS

DEMONSTRATE INVESTMENT INTO STRATEGIC PLAN
- Decisions are made based on increased impact (budget decisions and other programmatic decisions)

DEMONSTRATE REALLOCATION OF RESOURCES TO FUND NEW PROGRAMS IN ALIGNMENT WITH NEW RESULTS
- Rate, fee increase, correlated to recovering true cost of doing business
- Entrepreneurially insourcing services to increase revenue

DEMONSTRATE REALLOCATION OF RESOURCES TO NEW ENDEAVORS
- Enhance service levels with clear intent on outcomes
- Launch new programs with clear intent on outcomes

RESULTS CENTRIC LOCAL GOVERNMENT

ACHIEVE RESULTS · RESOURCEX · ORGANIZATION · REPROGRAM YOUR

ResourceXcellence Award in Recognition of Mastery in Fueling Resources Toward the Results of Tomorrow