City of Coral Gables City Commission Budget Workshop
Agenda Item A-1
July 11, 2017
City Commission Chambers
405 Biltmore Way, Coral Gables, FL

<u>**City Commission**</u>
Mayor Raul Valdes-Fauli
Vice Mayor Pat Keon
Commissioner Vince Lago
Commissioner Frank Quesada
Commissioner Michael Mena

<u>**City Staff**</u>
City Manager, Cathy Swanson-Rivenbark
Assistant City Manager, Peter Iglesias
City Attorney, Craig E. Leen
Deputy City Attorney, Miriam Ramos
City Clerk, Walter J. Foeman
Deputy City Clerk, Billy Urquia
Management & Budget Director, Keith Kleiman

<u>**Public Speaker(s)**</u>
Brendan Carry

Agenda Item A-1 [0:00:00 a.m.]
    A presentation of OpenGov Transparency functionality for the Coral Gables
    Website.

City Manager Swanson-Rivenbark: Mr. Mayor, just so that you know, I am going to suspend my
comments today for the interest of time. But, as you look through the budget estimate, I really
encourage you to look at each department's top three accomplishments for the year, because you

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will see then what you're getting for your money and what the residents are getting in terms of service. Each department has submitted certain highlighted accomplishments. They are significant and important, but we'll not review them at this point. We'll go right into our presentation.

Management & Budget Director Kleiman: Good afternoon, Mayor, Vice Mayor, and Commissioners. We're going to start off with a very quick presentation from OpenGov. And basically, that is going to be our new transparency portal on our City's website. And it's pure coincidence, I know, but Commissioner Lago had brought this up only two or three weeks ago, and we've been working on this for the last probably six months at least. Unfortunately, it takes a little time with the system we have in place. Eden is a little bit tough for the download. There's a lot of reconciliation going on, but we are near ready to go live and we wanted to make this presentation today. Another apology, unfortunately, the presenter could not make it here. He's in D.C., and their control tower was shut down six hours last night. So, he's on the web. His name is Brendan Carry, and he's going to be talking to us right now and taking you through - - it'll be on the monitors. And any questions you may have, he'll be able to answer them, okay.

Commissioner Lago: Thank you.

Management & Budget Director Kleiman: Brendan. Brendan.

Brendan Carry: Hello, everyone.

Commissioner Lago: Hello.

Mr. Carry: My name is Brendan. I'm with OpenGov. I really appreciate you all taking the time to allow me to present (INAUDIBLE)…

City Attorney Leen: Can't hear.

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Mayor Valdes-Fauli: I'm sorry, but your -- your presentation is unintelligible. Hello.

Mr. Carry: I'm here.

Mayor Valdes-Fauli: We can't understand a thing you're saying.

City Manager Swanson-Rivenbark: So, what we'll do, Mayor -- and I understand that the speaker is here, but the transmission is not…

Mayor Valdes-Fauli: Yeah.

City Manager Swanson-Rivenbark: Very clear. You all looked at one of our neighboring cities and saw what they are doing, and it so happens that our staff has been working on something that we think you will really like. And so, we wanted to have the -- our -- the customer service person guide you through, but I think we -- if we cannot get it clearer, we can't do it. So, we'll do individual briefings with you when we unveil it. But, you wanted to have the public be able to look at any point in time and see monies coming in, monies coming out, where it's going, and this is going to accomplish it in a very readable and financially literate way. And so, I think it's going to be better that we thank him for participating, but unless we can get it clearer, we'll just go on to our presentation. So, this is the company that we're working with, OpenGov, which is -- and so, we'll have another presentation that we'll be able to go through that with.

Management & Budget Director Kleiman: Okay, Brendan?

Mr. Carry: Can everyone hear me okay?

Vice Mayor Keon: Oh, yeah.

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Commissioner Quesada: It's much better.

Vice Mayor Keon: Yeah.

Mr. Carry: Excellent, glad to hear. So, thank you for inviting me to present to you all today. I wish that I could have been there in person, but the air traffic control in the D.C. area decided to have a gas emergency, which shut down all flights coming to and from Washington, D.C. But first and foremost, we're extremely excited to have Coral Gables as a customer. And, what I'll do is walk you through not just who OpenGov is as an organization, but also walk you through the development that we've already done on the OpenGov platform with big thanks to your IT team over there for providing us this information, and then also give you a quick example of what we can deliver on an ongoing basis. So, just to give you a little bit of background on OpenGov. We really started out as a purpose-built platform to provide public community engagement using financial information. We are a mission-driven company that is solely focused on power in government by bringing the same type of innovative technology that private sector businesses have at their own disposal. We currently have over 1,400 governments in our partnership, which has been really exciting to see grow, because I started with the company when we were only, you know, 200 partners. And, being over 1,400 now has been quite the whirlwind. Ultimately, the design focus around our software is centered on you, the government itself and the process that you go on an annual basis of developing a budget and setting benchmarks on how you're going to allocate the public resources toward common goods and services. And then ultimately, tracking towards the progress and the benchmarks that you've set in that budget and how you're performing to those targets that were defined at the beginning of the year, and then ultimately, communicating that information. Government is unique in which you have more stakeholders than really any other organization that operates in any other industry. And so, being able to efficiently and effectively communicate changes in the benchmarks that have been set and how you're progressing towards them is becoming even more critical as more and more resources within government are being tied up with other projects. So, what I'll do now is walk you through an example using both your data and another partner's data

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to showcase what our software can deliver and where you can actually take the OpenGov platform. So, what you all are viewing in this particular screen is Coral Gables internal OpenGov platform, where we've already uploaded a lot of financial information into usable reports, which make communication among different department heads or just between the government and its citizens easy and intuitive. I'll click into your annual report with the budget information for a quick, high-level overview of what we can deliver. What you're viewing here are multiple years of both budget and actuals, breaking down both revenues and expenses as it's trended over time. In this case, we're currently looking at the general fund only. And that's important, because what makes OpenGov unique in the space that we play in is that we are the only software provider that shows the financial and budget information in the full fidelity of the government's chart of accounts, which means when you present information to the public, they're able to view that information in the same way that administration or department heads would be looking at their own financials. And so, if we wanted to go and dig deeper into either our expense or revenue tree, we can simply click on our revenue. It shows us all of the major categories. We can drill deeper into our tax base, identifying what are the largest contributors to, you know, how we fund our general fund. And then, ultimately, we can normalize this information. So, if you wanted to look at very specific pieces of information -- let's just say, hypothetically, we were looking at the electric utility and electric franchise tax, within our filter function, instead of needing to know an account code or having to go in and run a report out of your accounting system, I can just search within all of our revenue types for electric, pull in the franchise tax, pull in the utility service tax, change the graphical representation to something that represents the data a little bit better, and then not only do we get these visuals that show us what's trending within the particular revenue source, but we also capture all of the dollars in cents detail, so that we can orient ourselves in a way that's familiar, but then still have access to what the true dollars and cents actually represent. Because, we don't expect everybody to be a multi-fund accounting wizard or understand how to navigate our filter view, you can actually bookmark what's the most relevant piece of information that we want people to either know what's going on or review on a periodic basis. So, on the left-hand side, we've created what we call saved report views, where if we wanted to review overtime spending by department, so that

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as we go into our budget setting period, we can see how in previous sessions we've trended towards the benchmark that we've set. Or, if we wanted to monitor tennis camp revenue, make sure that we're performing as well or better than previous years, or (INAUDIBLE) correct, if necessary, if we start to see shortfalls in something that was previously a money maker, or revenues for service charges. You can really customize this to anything that you want to highlight and make easily accessible. What I'm showing you now is the City of McKinney, Texas publicly available OpenGov platform, where anybody with an internet connection can go on and view this same exact information that I'm about to walk you through. And, what you'll notice is there's a number of reports that come out of different systems that aren't necessarily just financially oriented, like their capital improvement projects, their debt service, and then their checkbook functionality. So, in the case of McKinney, Texas, Texas has a platinum award for all of the cities or counties that go above and beyond what's expected in terms of providing access to the data that the cities and counties collect. McKinney, Texas was the first jurisdiction to receive a platinum award, because of its partnership with OpenGov and the way that it can deliver intuitive information to its public. And so, what you're viewing here is a checkbook report that allows users to search across every single vendor payment that McKinney, Texas has made, and then understand, under multiple years or within any of these individual years, how much has been spent on a monthly or yearly basis. And, then you can link this out to things like capital improvement projects, where not just on the timeline trend, but also geographically, you can highlight the areas in which the city is investing in infrastructure improvement that the entire community benefits from on a day to day basis. And so, I highlight these other reports, because OpenGov is a platform that's really customizable around what the strategic objectives are of the communities that we support. So, as your needs change and as the information that you deem most important changes, we can evolve with you. So, with that, I'll open it up to any questions that anybody within the room may have. Again, I really appreciate you taking the time to listen. And we're, you know, super stoked to get you all up and running and have a public portal available for your community.

Vice Mayor Keon: Questions?

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Unidentified Speaker: Any questions?

Commissioner Quesada: Oh, yeah. How long will it take to have -- be up and running?

Management & Budget Director Kleiman: Brendan, did you hear it?

Mr. Carry: Is that for me?

Management & Budget Director Kleiman: That's for you.

Mr. Carry: Got it. So, we're nearly there. We've gotten a lot of data from your team. And, my understanding is that we're in the final review process to ensure that everything is categorized correctly so that when the public views information, they're doing so in an accurate manner. So, I would defer to my colleague on the CS side or the Customer Success side. But, I feel like we're just -- we're near the finish line, maybe a couple weeks or a month away. Does that sound right from the Coral Gables team?

IT Director Rodulfo: (INAUDIBLE) at this time, updating the data. We have uploaded test data from previous periods. So, the data that you have seen that they have shown belongs to a previous period. So, we are working with Finance to update the data and bring it up to date with your authorization, so we could go live anytime soon.

Commissioner Quesada: So, our current data is in the software program now, just historical data, not current. Is that somewhere that I could look at it online, because it was tough to see it through like the WebEx?

Unidentified Speaker: Brendan, is that something that you can send us a link that the Commissioners could…

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Commissioner Quesada: Yeah.

Unidentified Speaker: Look at the data as it is now.

Commissioner Quesada: Because, again, it's kind of tough.

Vice Mayor Keon: I don't think he knows that you're talking to him.

City Manager Swanson-Rivenbark: And they can look at it another time. But we'll at least establish the link, so that they can view it at their leisure.

Commissioner Quesada: Yeah, not to look at now.

Commissioner Mena: And just one moral comment and then a question. But, from -- just from the limited amount I was able to see there, it seems like it's very robust, which is a good thing.

Commissioner Quesada: Is it too robust?

Commissioner Mena: It might be too robust. To me, sort of the magic of having something online for our community and something that works, I look at sort of Apple as the king of that, making things very simple and user-friendly. And, that looked like something very robust for somebody with a lot of sort of financial expertise to sort through. I'd like to see at least some option associated with it that's just a very simple way to look at our budget, the status of capital projects, whatever it might be. Just, again, robust is good. I think the more data people have at their disposal, the better; more transparent, the better. But, I also think presentation, as far as making it approachable for the average citizen, is really important, too.

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Management & Budget Director Kleiman: Right. And (INAUDIBLE) pie charts (INAUDIBLE).

Vice Mayor Keon: Well, you may want to pick out a few items that you think are the ones that are -- the things that the majority of residents want to look at. I mean, people that have, you know, more interest and more knowledge can go deeper and will dig deeper. But you know, I think some of it -- some of the things people want to look at is, you know, what is your budget. What are your revenues? You know, what are the taxes? Where do we get our revenue from? How is -- you know, where is it going? Those sorts of things, you know, it's like a FPL sheet, but -- you know, and have that as an introductory -- you know, it's like when you get your broker statement or something, it tells you what you invested and how much more you made. I mean, it's not a real thing, but as you go through it, you'll get all the investments. But, so -- maybe something that's -- you know, you can pick out what are the -- I mean, they must know, you know, based on their experiences in other cities, you know, what gets clicked on the most, what are people looking at the most. What is the ordinary resident most likely to want to know and maybe have that just as a, you know, an overview. I mean, so maybe have like an overview sheet or something like that that people can look on and then, you know, let them, you know, dig deep into the data as they want to dig.

Management & Budget Director Kleiman: I'm not quite adept at the functionality yet, but my understanding is that it will start at the high level…

Commissioner Mena: Right.

Vice Mayor Keon: Oh, okay.

Management & Budget Director Kleiman: Which is what most people want to see…

Vice Mayor Keon: Okay.

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Management & Budget Director Kleiman: And then, as he said, somebody could drill down, if they want to. They don't have to.

Vice Mayor Keon: Yeah.

Management & Budget Director Kleiman: They'll be able to see it, you know, the revenue budget and the expense budget and then stop.

Vice Mayor Keon: Yes.

Management & Budget Director Kleiman: But, that's something we'll make in pie charts.

Vice Mayor Keon: Yeah.

Management & Budget Director Kleiman: You'll see how much (INAUDIBLE)…

Vice Mayor Keon: Okay, great.

Commissioner Mena: Thank you.

City Manager Swanson-Rivenbark: We can go now into the regular budget. We just wanted you to see the kinds of information that you had wanted. We are loading on into that process and we're very excited about it.

Vice Mayor Keon: Thank you.

Management & Budget Director Kleiman: I just wanted to say thank you to Brendan Carry.

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Mr. Carry: Yes. Thank you, everyone, for inviting me in. I'm available for any additional questions should they come up after the meeting. But otherwise, I'll get out of your hair.

Mayor Valdes-Fauli: Thank you.

Management & Budget Director Kleiman: Thank you.

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