



“A Summit of Leading Practices”

Center for Priority Based Budgeting
2013 Annual Conference

- Fiscal Health
 - Priority Based Budgeting
 - High Performance Organizations
 - Civic Engagement
-

Arlington, Virginia, July 9 & 10, 2013

Hilton Crystal City Hotel



Brought to you by the Center for Priority Based Budgeting (CPBB) and the International City/County Management Association (ICMA) in partnership with the Alliance for Innovation (AFI)

Proudly Supported by Quartile 1 Conference Sponsor SAFEbuilt



Center for Management Strategies

“Today’s challenges have required local governments to work differently, looking to new and innovative approaches to service delivery, while at the same time reducing costs and increasing efficiency of operation. While “best” practices are always important for managers to follow and implement, it is those “leading” practices—creative and innovative ways to approach service delivery—that hold the greatest promise for us to truly “reinvent” government and the ways we do business...”



*Robert O’Neill, Executive Director,
International City/County Management
Association (ICMA)*

ICMA, the International City/County Management Association, develops and advances professional local government management to create sustainable communities that improve lives worldwide.

Be a part of the community of leading practices in local government management.



The Summit of Leading Practices

Fiscal Health

The Leading Practice of *Fiscal Health* is a unique, preventative diagnostic analysis that uncovers the root cause of an organization's fiscal "ailments" and unveils potentially unhealthy practices that can be easily corrected before the organization's fiscal position is compromised. ***Fiscal Health*** is attainable for every organization by undertaking CPBB's basic 5-step diagnostic process, and graphically depicting and communicating the organization's "*picture of fiscal health*" using the newly designed web-based ***Fiscal Health Diagnostic Tool***. Through a series of basic diagnostic questions, organizations gain a better assessment of not only their positive signs of ***Fiscal Health*** but also the root causes of the fiscal "dis-ease" impacting their long-term financial sustainability.

At the Conference: *Jon Johnson & Chris Fabian, CPBB, Tuesday July 9th at 9 AM*

Priority Based Budgeting

Priority Based Budgeting provides a comprehensive review of the entire organization, identifying every program offered, identifying the costs of every program offered, evaluating the relevance of every program offered on the basis of the community's priorities, and ultimately guiding elected and appointed officials to the policy questions they can answer with the information gained from the ***Priority Based Budgeting*** process.

In a time of stable or declining revenues, a traditional budget process often attempts to continue funding all the same programs it funded last year, albeit at a reduced level (e.g. across-the-board). ***Priority Based Budgeting*** identifies the services that offer the highest value and continues to provide funding for them, while reducing, divesting, or potentially eliminating lower level services.

At the Conference: *Jon Johnson & Chris Fabian, CPBB, Tuesday July 9th at 1:15 PM*

High Performance Organizations

What are the key factors that matter most when you want to move towards higher performance in your organization?

This session will provide a short overview of the **High Performance Organizations (HPO) Model** that many local governments are using to sharpen their performance, increase citizen satisfaction and reduce costs. Learn how leadership at all levels as well as a focus on both the “vision” and “values” of an organization can increase employee engagement and bring out the many talents hidden in most local governments. The **High Performance Organization Model** has been named as a best practice by ICMA's Center for Management Strategies and is promoted by its Center for Management Strategies.

At the Conference: Anton Gardner, Commonwealth Centers for High Performance Organizations, Wednesday July 10th at 10:15 PM

Civic Engagement

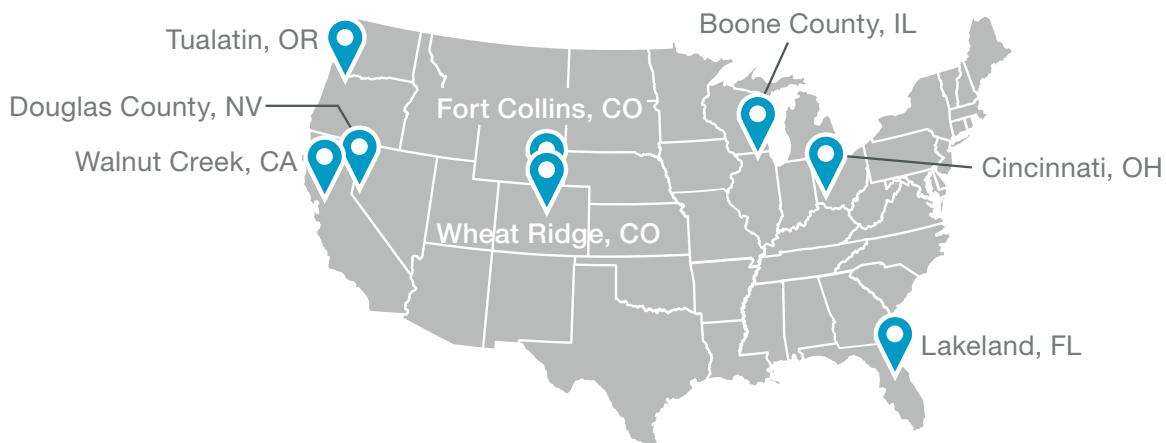
Involving residents in community building is an important aspect of local government. While it may be time-consuming, it increases understanding and trust. Finding out what is on the mind's of their residents and allowing them to become involved builds better, more cohesive communities and improves the satisfaction levels of citizens with their local government. Effective local governments today are finding new and ever expanding ways to involve their residents in the work of government, ranging from civic education to on-line/social media tools, to restructure public hearings and strategic planning processes. All of this is designed to better connect the work of government to the community and to utilize the talents and skills of citizens and business people to build our communities.

At the Conference: Pete Peterson, Davenport Institute of Public Policy, Wednesday July 10th at 9 AM

Case Studies & User Group Experience

Come hear from pioneering local government experts from across the country who have successfully implemented leading practices.

At the Conference: Multiple leading local government experts, July 10th 1 PM to 5 PM



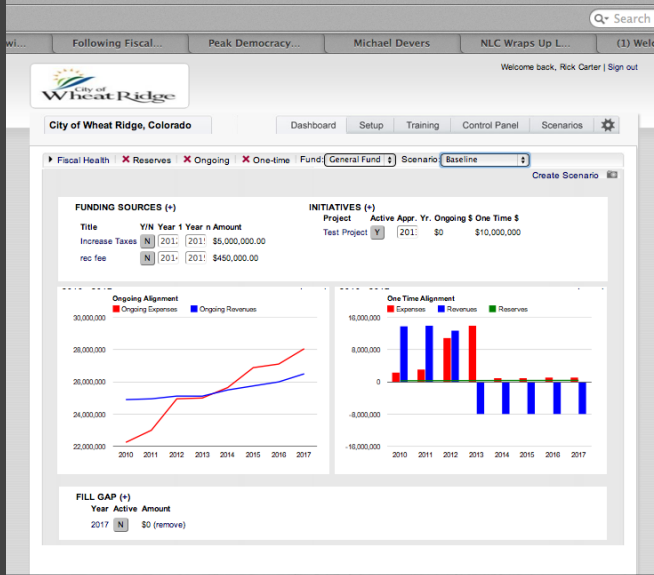
Tech & Tools Showcase

A highlight to this year's conference will be an intense and in-depth focus on the technology and tools that make our work effective. "The Unique Lens" is itself a product of the process as are the tools that have opened up a view on local government strategy, culture, management and decision-making unlike anything else.

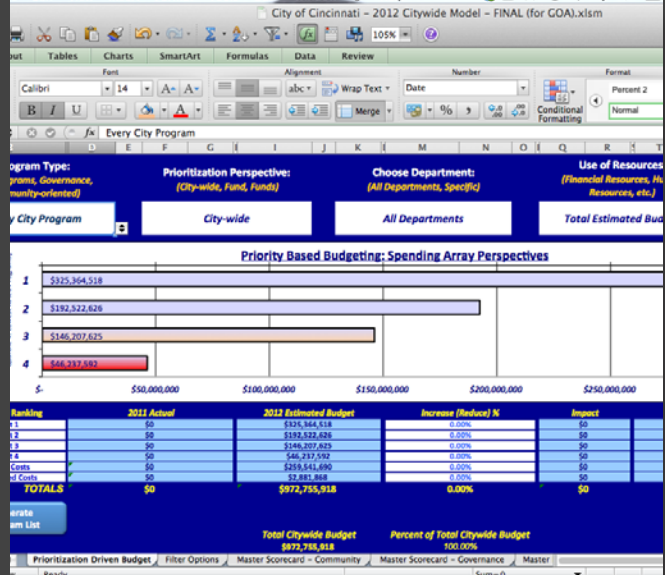
Through these tools, some have observed that Priority Based Budgeting may be a breakthrough concept equivalent to "BIG DATA" for local government. We are so excited to bring to the stage the latest technology and tools that are helping communities change the way they budget, change the way they communicate, change the way they interact with citizens, and change the way they lead to greatness.



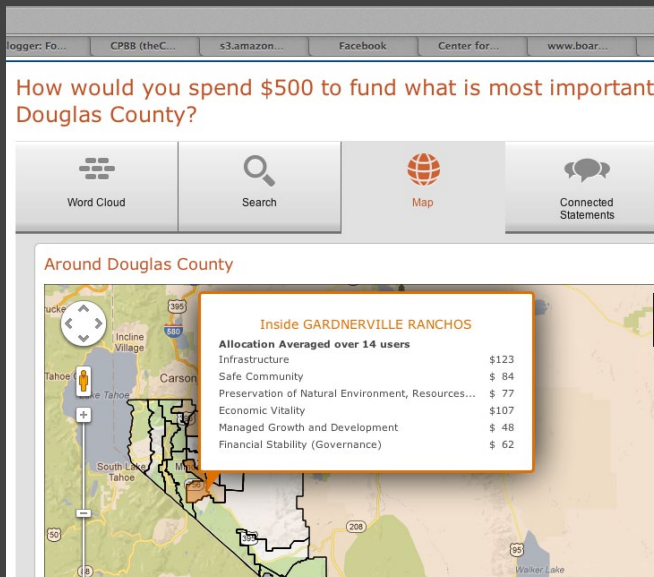
Web-based Fiscal Health Diagnostic Tool



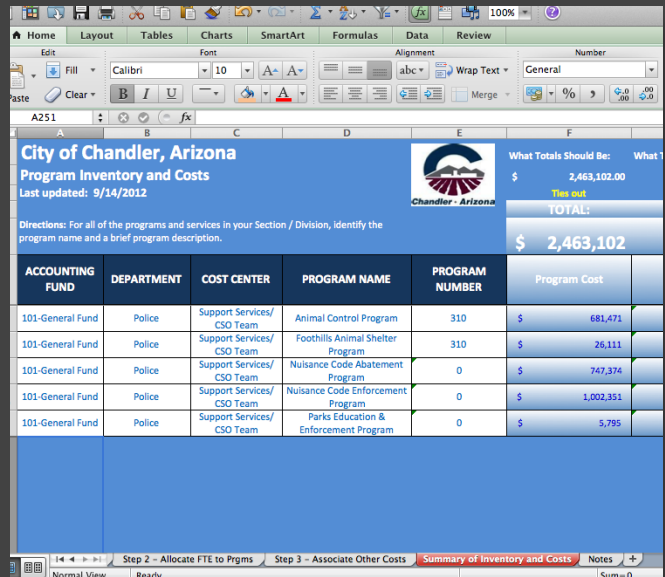
Resource Alignment Diagnostic Tool



Online Citizen Engagement



Program Costing Tool



About the Conference

This event aims to equip all attendees with the knowledge needed to understand this new way of assessing fiscal health, building budgets, engaging citizens and developing high performing organizations. Actual practitioners of the Center will speak on what this exciting way of implementing Leading Practices, with a focus on ***Priority Based Budgeting***, has done for their communities and what it can do for yours.

From large organizations (such as the cities of Cincinnati, Ohio, Sacramento, California and Edmonton, Alberta) to mid-sized communities (like the Colorado cities of Boulder, Wheat Ridge and Fort Collins) to smaller communities (such as Blue Ash, Ohio and Douglas County, Nevada), the processes and tools developed by **CPBB** have proven effective, scalable, and best of all, repeatable. **CPBB** has already led over 40 communities through this comprehensive body of work. Representatives from several local governments will present at this event to provide attendees with first-hand accounts of how these innovative processes actually work and the kinds of amazing outcomes you can expect from them.



**CENTER FOR
PRIORITY BASED BUDGETING**

Purpose of Conference:

Equip attendees with the fundamentals of Fiscal Health, Priority Based Budgeting and all Leading Practices to learn how to:

- Assess the fiscal health of your community
- Create a meaningful, engaging and exciting role for citizens in the process
- Effectively bring your elected officials into a strategic budget process that allows them to focus on driving policy
- Escape budgeting processes that amount to little more than revisions to previous year's budgets and
- Match funding allocations with the priorities that exist in your community.

First-timers to Priority Based Budgeting, as well as experienced veterans will:

- Engage with, and learn from the nation's leading practitioners in Fiscal Health and Wellness through Priority Based Budgeting
- Hear directly from city and county leaders who have been in your shoes, and implemented these processes successfully in their organizations
- Participate in the first-ever of it's kind "User Group" of Fiscal Health and PBB practitioners

Exhibitors & Sponsorship Opportunities

Exhibit space and conference sponsorship opportunities are available. To reserve a prominent opportunity to reach high-level local government decision makers in positions of purchasing authority, contact Erik Fabian at efabian@pbbcenter.org or call 503.866.4580.

Conference Schedule

Conference venue is the Hilton Crystal City Hotel.

All conference sessions will be held in the Adams/Madison Room.

Tuesday, July 9th



8am – 8:30am

Coffee and Networking (sponsored by SAFEbuilt)

8:30am – 9am

[More >](#)

Conference Kickoff- ICMA and the Alliance for Innovation: "A Summit of Leading Practices"

ICMA Director of the Center for Management Strategies, Cheryl Hilvert, and the Alliance for Innovations' Pam Muse and Toni Shope

9am – 10:45am

[More >](#)

Achieving Fiscal Health – 5 Step Diagnostic and Treatment Process

Jon Johnson & Chris Fabian, Center for Priority Based Budgeting

10:45am – 11am

Break

11am – 12pm

Technology and Tools Showcase #1: The Web-based Fiscal Health Diagnostic Tool

Jim Teece, Project A, Chris Fabian & Jon Johnson, Center for Priority Based Budgeting

12pm– 1:15pm

Lunch Break

1:15pm – 2:30pm

Priority Based Budgeting – Approach and Outcomes in over 40 Communities

Jon Johnson & Chris Fabian, Center for Priority Based Budgeting

2:30pm – 3pm

Technology and Tools Showcase #2: The Resource Alignment Diagnostic Tool

Chris Fabian & Jon Johnson, Center for Priority Based Budgeting

3pm – 3:15pm

Break

3:15pm – 4pm

[More >](#)

The Imperative of Fiscal Health and Priority Based Budgeting from the Elected Officials Perspective

Kathie Novak, Senior Advisor, Center for Priority Based Budgeting, Lecturer at the Daniels College of Business at the University of Denver

4pm – 4:30pm

Technology and Tools Showcase #3: Online Citizen Engagement Tool, Peak Democracy on Civic Engagement in Context of PBB

Robert Vogel, Peak Democracy

4:30pm – 5pm

[More >](#)

Technology and Tools Showcase #4: Using Resident Opinion to Influence Decision Making

Tom Miller, President, National Research Center

6pm – 9pm

Exhibition Hall Opening & Party (Featuring PBB Alley)

Free to all registered attendees: Come support conference sponsors and exhibitors

Wednesday, July 10th

8am – 8:15am	Coffee and Networking
8:15am – 9am More >	GFOA’s Shayne Kavanagh Discusses Leading Practices and their Context of Long Term Financial Planning <i>Shayne Kavanagh, Government Finance Officers Association (GFOA)</i>
9am – 10am More >	The Power of Legitimate Citizen Engagement <i>Pete Peterson, Davenport Institute of Public Policy</i>
10am – 10:15am	Break
10:15am – 11:45am	Priority Based Budgeting and the High Performance Organization (HPO) Model <i>Jon Johnson & Chris Fabian, Center for Priority Based Budgeting, Anton Gardner, Commonwealth Center for High Performance Organizations</i>
11:45am– 1pm	Lunch Break
1pm – 1:30pm More >	Case Study #1 – Douglas County, Nevada: Online Citizen Engagement and Use of PBB in the Bond Rating Process <i>Stephen Mokohrosky, Kathy Lewis & Christine Vuletich, Douglas County, Nevada</i>
1:30pm – 2pm More >	Case Study #2 – City of Wheat Ridge, Colorado: Ideal Implementation of the Entire Fiscal Health and Wellness through Priority Based Budgeting Model <i>Patrick Goff, Heather Geyer & Nathan Mosley, City of Wheat Ridge, Colorado</i>
2pm – 2:30pm More >	Case Study #3 – City of Cincinnati, Ohio, Guiding Elected Officials to Policy Questions Using the Resource Alignment Diagnostic Tool <i>Lea Eriksen, City of Cincinnati, Ohio</i>
2:30pm – 5pm More >	“User Group Experience”/ Panel Discussion <i>Douglas County, NV / Wheat Ridge, CO / Cincinnati, OH / Fort Collins, CO / Walnut Creek, CA / Lakeland, FL / Tualatin, OR / Boone County, IL</i>



Join us in Washington, D.C.

“A Summit of Leading Practices”

2013 CPBB Annual Conference | July 9 & 10, 2013

Target Audience of Conference:

Innovative, responsible, creative and forward-thinking local government managers, financial officers, mayors, elected officials, county administrators and professional staff from all departments.





Conference Registration Fee:

\$329 Early-bird *(if you register by 5/31)*

\$359 *(if you register after 5/31)*

(includes free entry to 7/9 Exhibition Hall Opening Party (Featuring PBB Alley))

Conference Hotel:

Hilton Crystal City Hotel = \$144/night + taxes

Please click on this [hotel reservation link](#) or call 1-800-695-7551 to make your reservation. Please specify that you are attending the Center for Priority Based Budgeting Conference to get these special rates.

[Click Here to Register >](#)

Session Highlights

Kick-off to the Conference from ICMA and the Alliance for Innovations

The International City/County Management Association (ICMA) and the Alliance for Innovation are the co-sponsors of this year's conference—"A Summit of Leading Practices."

The theme of this year's conference was chosen for a very specific reason: because of the leadership of ICMA and the Alliance, "Leading Practices" are being established to set a direction for local government management, and for the sustainability of our communities. We wanted to focus a spotlight on these "Leading Practices" in order to demonstrate how they work together, how they can build upon Fiscal Health and Wellness through Priority Based Budgeting, and how they can be a roadmap for any local government that is on the path of greatness.

Hear from the Director of ICMA's Center for Management Strategies, Cheryl Hilvert, as she describes why ICMA has embarked on this exciting new endeavor to establish "Leading Practices." And hear from the Alliance for Innovation's Pam Muse and Toni Shope as they articulate the role of the Alliance as the "Bell Labs" of local government, vetting "Emerging Practices" as they go through the testing and research process that ultimately results in their becoming a "Leading Practice."

Presenters:



Cheryl A. Hilvert
Director, Center for Management
Strategies, International City/
County Management Association



Pam Muse and Toni Shope
Western Regional Director and Eastern Regional Director (respectively),
Alliance for Innovation

Session Highlights

The Success of Fiscal Health and Priority Based Budgeting from the Elected Official's Perspective

Kathie Novak deeply understands the needs of elected officials—she was an elected Mayor, as well as President of the National League of Cities. Hear her exciting perspective about the breakthrough of **Priority Based Budgeting** as a means for elected officials to understand the budget and make better decisions as a result.

“When I was an elected official, if I had had the Fiscal Health Diagnostic Tool, and Priority Based Budgeting at my disposal, I would have made better decisions. Although I have a business degree, when it comes to the annual budgeting process in my city, it was very painful. I didn’t know what I was supposed to do with the numbers in the budget book, and rarely knew what questions to ask that really got to the “big picture” that I was supposed to be dealing with. These tools would have changed the nature of our discussions and decisions in a very productive manner.”

When this former President of the National League of Cities and former 17-year elected official told this to the Center’s founders, they took notice.

Kathie’s perspective on these tools is incredibly insightful. “Too often,” she says, “the elected officials are perceived as barriers to progress, as a challenge to work around rather than key, strategic partners of the administration.” **Priority Based Budgeting** and **Fiscal Health** change this dynamic by putting elected officials in a role where they can succeed.



Presenter:

Kathie Novak

Senior Advisor, Center for Priority Based Budgeting,
Lecturer at the Daniels College of Business at the University of
Denver, Institute Director for the Colorado Municipal Clerk’s
Association, Past President of the National League of Cities,
Former Mayor and Council member, City of Northglenn, Colorado

Session Highlights

The Power of Legitimate Citizen Engagement

Learn what legitimate citizen engagement is all about, and how it can support **Priority Based Budgeting**. Also hear how the **Davenport Institute** can work with your city government, school district, and civic organization in a variety of ways—from speaking to your community about the virtues and possibilities of civic engagement, to their Public Engagement Grant Program, which offers communities up to \$25,000 to carry out legitimate engagement projects.

“The mission of the Davenport Institute couldn’t be more timely. The civic engagement process and the introduction into the civic arena of ‘deliberative democracy’ is essential at this time. The gap between service expectations by the public and the public sector’s inability to deliver those services needs to be bridged.”

– Dennis Donohue, Mayor of Salinas, California 2006-2012
(Davenport Institute’s website)

The **Center for Priority Based Budgeting** has benefited from the **Davenport Institute’s** mission and dedication to civic engagement. Through the Institute’s Public Engagement Grant Program, both the City of Walnut Creek, California and the City of Fairfield, California were recipients of grant support for their work in bringing citizens into the **Priority Based Budgeting** process.

Priority Based Budgeting has been an effective mechanism to create a successful role for citizens to influence their communities.

We couldn’t be more honored to have Pete Peterson, Executive Director of the **Davenport Institute** on the program as he brings to life stories of success in “legitimate civic engagement.”



Presenter:

Pete Peterson

*Executive Director, Davenport Institute for Public Policy
Pepperdine University*

Session Highlights

Case Study #1 — Douglas County, Nevada: Online Citizen Engagement and Use of PBB in the Bond Rating Process

Douglas County, Nevada has implemented a game-changing approach to citizen engagement. In 2012, the County embarked on the **Priority Based Budgeting** process with one of the primary objectives being to bring their community into an ownership position with respect to decision making. What unfolded in their groundbreaking use of an online tool to engage citizens sets the bar at a whole new level in participatory budgeting. Not only that, but the County's bond rating was affirmed as a result of their work.

Citizen engagement in the budget process has been increasingly of interest in local government budgeting. The logic follows that the more citizens can authentically contribute and influence the decisions being made by their government, the more ownership they might take in their community. Trust increases with transparency. Compassion comes with trust. The benefits are undeniable.

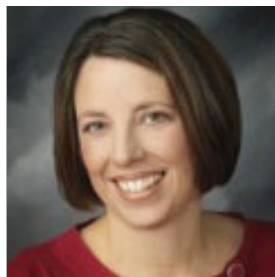
Still, organizations ask us, "but what about the risks inherent in citizen engagement? What is the right role for citizens?" We're asked, "to what degree is it appropriate, safe, meaningful, realistic and effective to have citizens participate in decision making?" In our work, we continue to strive for answers to these questions—they are the right questions. With the potential for such great outcomes, if we can answer those questions correctly, and involve citizens in more meaningful and influential ways, our communities can achieve everything they hope for!

Hear Douglas County, Nevada's experience in putting citizens in the driver's seat of their **Priority Based Budgeting** process. Special thanks to Peak Democracy—our partners in the development of the "County Budget Challenge."

Presenters:



Stephen Mokohrosky
County Manager,
Douglas County, Nevada



Kathy Lewis
Budget Manager,
Douglas County, Nevada



Christine Vuletich
Assistant County Manager/
Chief Financial Officer,
Douglas County, Nevada

Session Highlights

Case Study #2 — City of Wheat Ridge, Colorado: Ideal Implementation of the Entire Fiscal Health and Wellness Through Priority Based Budgeting Model

The City of Wheat Ridge, Colorado is the first community to implement the entire approach to ***Achieving Fiscal Health and Wellness through Priority Based Budgeting***—incorporating the ***Fiscal Health*** approach to communicating their financial forecast with the ***PBB*** process for resource allocation. Hear from City leaders how the ***Fiscal Health*** model changed the conversation with their elected officials, and how ***Priority Based Budgeting*** is being used to address the budget.

*"PBB is truly more than just a way to address your 'budget woes.' The great thing about **Priority Based Budgeting** is it can help **support the type of culture an organization** desires by not simply viewing this process as a budget tool when it is really **so much more**. PBB is helping us **further our culture** in areas where we know we have room for improvement. **PBB is more than being about the state of your budget, it is about the state of your organization...**"*

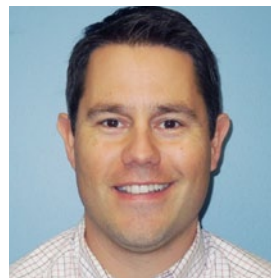
Presenters:



Patrick Goff
City Manager,
City of Wheat Ridge,
Colorado



Heather Geyer
Administrative Services
Director, City of Wheat
Ridge, Colorado



Nathan Mosley
Management Analyst,
City of Wheat Ridge,
Colorado

Session Highlights

Case Study #3 — City of Cincinnati, Ohio: Guiding Elected Officials to Policy Questions Using the Resource Alignment Diagnostic Tool

The City of Cincinnati's use of **Priority Based Budgeting** (through their "Priority Driven Budgeting" initiative) establishes one of the greatest advancements in the use of the process to guide policy direction. The organization's response to Council's policy direction provides one of the most comprehensive evaluations of city services across the entire organization.

Many organizations have approached us with a strong desire to bring their elected officials into a constructive and transparent discussion about the budget—Cincinnati has set the bar high in this respect. In the most direct way possible, the City used **Priority Based Budgeting** to guide policy-oriented discussions. One of the benefits of the process is that it creates specific roles for elected officials to participate and succeed. When elected officials can focus on key policy questions that impact resource allocation, when they're provided input and transparency in the way their policy questions are answered, and when they can make decisions based on policy impacts, then they've played a successful role in budgeting.

Click here to see a detailed program listing—the budget status of every City Program in **PBB** terms: the status of each program in terms of which are increased, decreased, receive no funding change, become reorganized, or are under review.



Presenter:

Lea Eriksen
Budget Director
City of Cincinnati, Ohio

User Group Experience

Practitioners Panel Discussion

City of Fort Collins, Colorado

Fort Collins is one of the world's leading experts in Results Based Budgeting—a pioneer in the implementation of “Budgeting for Outcomes” (BFO), having most recently integrated “Priority Based Budgeting” as a new layer to support decision making. Hear from the City as they describe what an unwavering commitment to “Results” has meant for their culture and their community.



***Darin A. Atteberry**
City Manager, City of
Fort Collins, Colorado*

City of Walnut Creek, California

Walnut Creek is one of the earliest implementers of Priority Based Budgeting, having incorporated the process into their culture first in FY 2009–10. Last year, the City spoke about the "sustainability" of the process through changes in leadership – turnover at both the Council and manager levels. This year, come hear how the City has reinvented their budget book for citizens, creating a one-of-a-kind, magazine-style Budget Story to reach their citizens in an entirely new way. Presenting the budget as a story is a game-changing leap in creating transparency in local government budgeting.



***Lorie Tinfow**
Assistant City Manager,
City of Walnut Creek,
California*

City of Lakeland, Florida

Lakeland, Florida was the first community to implement **Priority Based Budgeting** after the process was described in the 2008 edition of ICMA's PM Magazine. Over the past 5-years, the City has successfully evolved the process, incorporating Key Performance Indicators (KPI's) to ensure that performance measures support the evaluation of services in the way they do business.



***Kindle Bowden**
Office of Management &
Budget Manager, City of
Lakeland, Florida*

City of Tualatin, Oregon

The City of Tualatin, Oregon is among the very first to adopt the Fiscal Health Diagnostic Tool, putting it to use in 2009 and continuing to this day. Fiscal Health has become a means of communication—a translator of financial information for decision makers. In fact, since 2009, the City has been so diligent about using the Diagnostic Tool to maintain their Fiscal Health, we joke that they have prevented the need to ever use Priority Based Budgeting! Come see how the City uses Fiscal Health to communicate with elected officials, and as a data-visualization tool that depicts real-time impacts of various scenarios with a financial impact.



Don Hudson
*Finance Director,
City of Tualatin, Oregon*

Boone County, Illinois

Boone County, Illinois provides a stunning illustration of how the principles of Fiscal Health can be used to strengthen a community's bond rating—a "Holy Grail" of sorts, in terms of using the principles in the most effective way possible!

In “Excelling in Times of Fiscal Distress,” an article Bob O'Neill wrote for *Governing Magazine*, about the time that Boone County was adopting Fiscal Health, he wrote “Most of us can articulate the early-warning signs that preceded the current economic downturn: Global forces that dramatically changed the local, state, and federal playing fields. Skyrocketing fuel costs. A failing housing market... property tax limitations. Yet, many of us failed to correctly interpret these early-warning signs in relation to their impact on our government organizations.”

Interpretation is the key! That is what Boone County has excelled in—both with their elected officials, and with the bond rating agencies.



Kenneth A. Terrinoni
*County Administrator,
Boone County, Illinois*

...and more to be announced!

Session Highlights

Technology and Tools showcase #4: Using Resident Opinion to Influence Decision Making

The very foundation of Priority Based Budgeting rests on the identification and correct assessment of an organization’s purpose. “Why are we here?” and “What are we in business to do?” are the fundamental questions we must grapple with. The answers to these questions are what we call *Results*. Results help to identify the very fundamental reasons that a local government exists—articulating all the ways it serves the needs of the community (as opposed to a list of specific projects or initiatives that need to be considered during the next budget cycle). Results are truly unique to your community, in that they attempt to represent why your local government exists and why it offers the types of unique services it does to the community.

As President of National Research Center, Inc. (NRC), Tom Miller has helped hundreds of jurisdictions use citizen surveys to identify their Results.

“We see such a strong link between the work NRC does to give voice to resident opinion and the budgeting principles of CPBB that rest on community-set priorities. We can’t imagine a better opportunity to show that connection.”

NRC pioneered the development of The National Citizen Survey™ (The NCSTM), and continually adapts the tool to reflect current government needs and priorities. In its current iteration, The NCSTM serves as more than just a scorecard for government services – it helps infuse resident values into decision-making processes like priority based budgeting.

The NCSTM was among the first scientific surveys developed to gather resident opinion on a range of community issues, and is the only citizen survey assessment tool endorsed by ICMA and the National League of Cities. Communities using The NCS have reported that the tool helped improve performance, strengthen communications with community stakeholders, and identify clear priorities for use in goal and budget setting.

Learn more about measuring resident opinion from the man who literally wrote the book about why citizen surveys are important, and how to use them.



Presenter:

Tom Miller
President
National Research Center, Inc.

Session Highlights

GFOA's Shayne Kavanagh Discusses Leading Practices and their Context of Long Term Financial Planning

Shayne Kavanagh is the Senior Manager of Research for **GFOA**. Shayne has been developing the practice and technique of long-term financial planning for local government since 2002 and has been working with local governments on financial planning ever since.

The Center for Priority Based Budgeting has had the privilege to collaborate with Shayne since 2008 when we spoke together about Priority Based Budgeting at GFOA's **Annual Conference** in Fort Lauderdale, Florida. We've each been on the front-lines of the "New Normal" throughout these last few years and it was Shayne's objective research about how local governments are not only surviving, but creating great transformations in their organizations and their communities that led us to partner on GFOA's **White Paper: Anatomy of a Priority Driven Budgeting Process**.

He is the author of a number of publications on financial planning, including:

- Financing the Future, the leading book about long-term financial planning in local government
- Financial Policies, the essential guide to developing and implementing policies that define standards for financial management.
- And a number of articles on long-term financial planning, financial policies, budget reform, using technology to improve efficiency, and other related topics for magazines including Government Finance Review, Public Management, School Business Affairs, and Public CIO.

He is also a regular speaker on the topic of financial planning, having spoken at a number of conferences on the topic, including: the national GFOA conference, the International City/County Managers Association, the National League of Cities, and the National Tax Association. He has also been as guest lecturer at Northern Illinois University, the University of Illinois at Chicago, and the University of Chicago.

We are so pleased to have Shayne bring the lessons learned of Long-term Financial Planning to the Summit of Leading Practices.



Presenter:

Shayne Kavanagh

Senior Manager

Research & Consulting,

Government Finance Officer's Association (GFOA)

Session Highlights

Achieving Fiscal Health and Wellness through Priority Based Budgeting (Covered in two sessions)

The **Center for Priority Based Budgeting's** novel budgeting process has gained nationwide recognition because it has proven meaningful to local governments which are either addressing short-term budgetary distress or rebuilding in a post-recession environment. This is why nationally acclaimed associations such as the International City/County Management Association (ICMA), the Government Finance Officers Association (GFOA) and the Alliance for Innovation have been promoting the Center and its work.

Repeated success stories have demonstrated that **Priority Based Budgeting** guides governments to better articulate why the services they offer exist, what price citizens pay for them, and, consequently, what value they offer citizens.

Hear the case studies from among the 40 organizations that have implemented **Fiscal Health and Wellness through Priority Based Budgeting** from organizations as large as the City of Cincinnati, OH and the City of Edmonton, AB; as small as the Town of Christiansburg, VA; as politically interesting and complex as the City of Boulder, CO and Monterey, CA; cities, counties, special districts from east coast to west coast and in-between.

Specifically, learn how the process can help you:

- **Prioritize Services: *Priority Based Budgeting*** evaluates the relative importance of individual programs and services rather than entire departments. It is distinguished by prioritizing the services a government provides, one versus another.
- **Do the Important Things Well. Cut Back on the Rest:**
In a time of stable or declining revenues, a traditional budget process often attempts to continue funding all the same programs it funded last year, albeit at a reduced level (e.g., across-the-board budget cuts). ***Priority Based Budgeting*** identifies the services that offer the highest value and continues to provide funding for them, while reducing, divesting, or potentially eliminating lower level services.

- **Question Past Patterns of Spending:**

An incremental budget process doesn't seriously question the spending decisions made in years past. **Priority Based Budgeting** puts all the money on the table to encourage more creative conversations about services.

- **Provide Transparency of Community Priorities:**

When budget decisions are based on a well-defined set of community priorities, the government's aims are not left open to interpretation.

- **Provide Transparency of Service Impact:**

In traditional budgets, it is often not entirely clear how funded services make a real difference in the lives of citizens. Under **Priority Based Budgeting**, the focus is on the results the service produces for achieving community priorities.

- **Demand Accountability for Results:**

Traditional budgets focus on accountability for staying within spending limits. Beyond this, **Priority Based Budgeting** demands accountability for results that were the basis for a service's budget allocation.



Presenters:

*Chris Fabian and Jon Johnson
Co-Founders,
Center for Priority Based Budgeting*

Sponsors

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Quartile 1



Quartile 2

Quartile 3

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720 S. Colorado Boulevard, Suite 1000-N, Denver, Colorado 80246
303-520-1356 *office* | 303-691-9490 *fax*