Transparency Stars

GFOAT Fall Conference – November 2019
presented by Bethany McCrady
Richardson’s Transparency Efforts

• July 2007 – Agenda documents posted online
• August 2009 – Council meetings live-streamed on web site
• October 2010 – Formal Transparency Page debuts
  – Receives State Comptroller’s Gold certification
• November 2011 – Council handouts posted online prior to start of meetings
• March 2012 – City Plan Commission live-streamed on web site
• November 2014 – Transparency Page receives Platinum certification
• June 2017 - Awarded Transparency Stars (all five stars)
Moving From Transparency Circle to Transparency Stars

• Interpreting the requirements
• Some pieces of our Transparency Circle page could be reused
• Current ERP Software has limited reporting capabilities
• Department web editors use VisionLive software
Challenges

Contracts & Procurement:

✓ Authorizations versus Actual Procurement Expenditures:
  • Timing differences from when PO was issued versus when funds are spent. Blanket PO’s or Cap Project PO’s can cross fiscal years.

✓ Information not previously tracked:
  • Business Sector (categories) – had to go back one year and gather information
  • Total $ amount and # of bids received – had to go through all bid tally sheets and consolidate

✓ Updates to documents
  • Purchasing data/documents change weekly; needs near real-time updates
Buildout and Review Process

- City Manager greenlights project
  - Formal approval for new data types
- Financial Analyst creates draft webpages
- Director of Finance/Chief Financial Officer review
  - Advised on language, data presentation, interpreting the program’s requirements
- Presentation to City Manager’s team
- Presentation to Council
  - Pages made visible the following morning
- Application to Comptroller for Stars Awards
Additional Considerations

• Full and equal access to transparency data
  – Alt text for images, especially graphs
  – Meaningful page titles
  – Meaningful link text
  – Consistent, clean navigation and content

Alt Text:
A graph showing the revenue per capita by fiscal year:
2014=$2,313; 2015=$2,420; 2016=$2,555; 2017=$2,636; 2018=$2,742
### Timing of Updates

**Example: Contracts and Procurement**

<table>
<thead>
<tr>
<th>Contracts &amp; Procurement Summary:</th>
<th>When to update:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement &amp; Contracting Spending</td>
<td>After close of fiscal year</td>
</tr>
<tr>
<td>Total number of publicly posted opportunities</td>
<td>After close of fiscal year</td>
</tr>
<tr>
<td>Total number of closed bids/contracts</td>
<td>After close of fiscal year</td>
</tr>
<tr>
<td>Total dollar amount of received</td>
<td>After close of fiscal year</td>
</tr>
<tr>
<td>Total dollar amount awarded from contracts</td>
<td>After close of fiscal year</td>
</tr>
</tbody>
</table>

**Visualizations:**

<table>
<thead>
<tr>
<th>When to update:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time trend - authorized vs. actual expenditures</td>
</tr>
<tr>
<td>Contracts split by business sector</td>
</tr>
</tbody>
</table>

**Documents:**

<table>
<thead>
<tr>
<th>When to update:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid docs, Intent to Award Docs &amp; Contracts</td>
</tr>
<tr>
<td>Vendor Registration forms/guide</td>
</tr>
<tr>
<td>Purchasing manual and glossary</td>
</tr>
</tbody>
</table>
Responsibility for Updates

• Financial Analyst
  – Summary data for all pages
  – Visualizations
  – Collection and publication of annual reports, policy updates, etc.
  – Wording, new elements, other miscellaneous updates

• Tax
  – ED Agreements and Payment spreadsheets

• Purchasing
  – Bid documents and conflict of interest forms
Visitation and Usage

• More scrutiny vs. self serve
  – Open records requests may be answered by providing a link to the data
  – Data provided is open to misinterpretation
  • Clear explanations are key

**General Economic Development** – The City enters into various agreements under Chapter 380 of the Texas Local Government Code to stimulate economic development. Agreements may rebate a flat amount or percentage of property taxes or sales tax received by the City, or make lump sum payments to offset moving expenses, tenant finish-outs, demolition costs, infrastructure reimbursements, redevelopment costs or other expenses.

**Chapter 380 Agreements**
View agreement documents and payment information for each agreement.
Visitation and Usage

- Tracking visitation can give insight into user interests and behavior
- Contracts and Procurement activity is shown below
- Internal utility is high as a source for vetted, easy to navigate information
Getting Started

✓ Assess what is already available
✓ Identify easily generated items
✓ Identify challenges
✓ Find resources
✓ Gather a team
Telling your Story

• This is your opportunity to educate and inform the public about how your organization operates.
• Don’t stick to the facts!
• Value added elements
  – Open Records Requests
  – SB 1221 (hotel occupancy tax rates and revenue)
  – HB 3693 (utility usage and costs)