

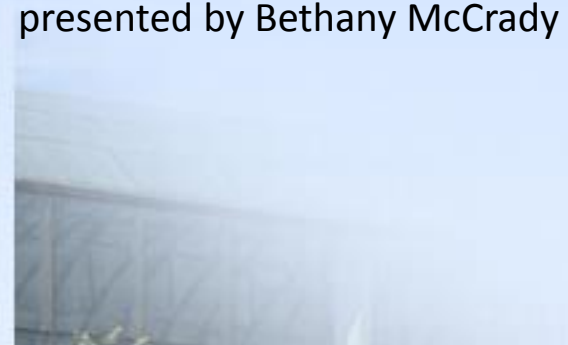


Transparency Stars

GFOAT Fall Conference – November 2019

presented by Bethany McCrady

City of Richardson
Finance



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



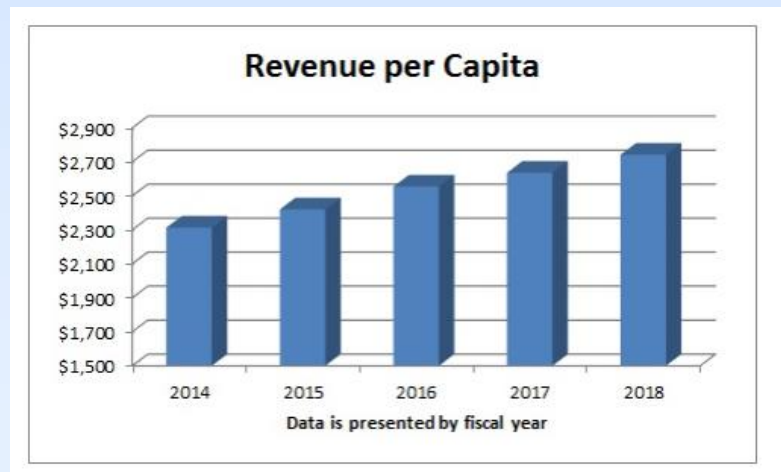
Buildout and Review Process

- 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

Contracts & Procurement Summary:	When to update:
Procurement & Contracting Spending	After close of fiscal year
Total number of publicly posted opportunities	After close of fiscal year
Total number of closed bids/contracts	After close of fiscal year
Total dollar amount of received	After close of fiscal year
Total dollar amount awarded from contracts	After close of fiscal year
Visualizations:	When to update:
Time trend - authorized vs. actual expenditures	After close of fiscal year
Contracts split by business sector	After close of fiscal year
Documents:	When to update:
Bid docs, Intent to Award Docs & Contracts	Updated weekly
Vendor Registration forms/guide	As needed
Purchasing manual and glossary	As needed



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.

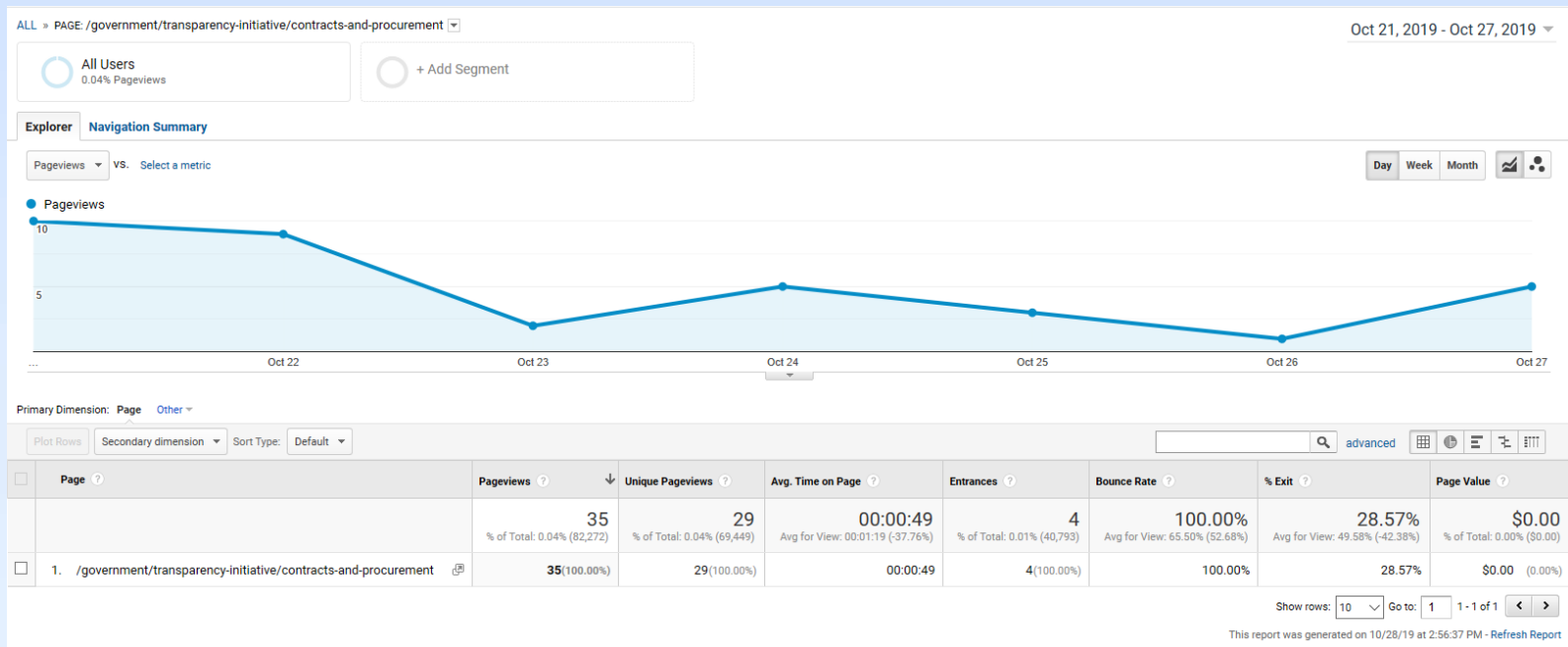
[Chapter 380 Agreements](#)

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)

