Budget Narrative Database (BUN-D)

Scottsdale Budget Development and Management System with enhanced Charted Performance Measures

Budget Office

1/1/2020

(Last Updated)

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BUDGET NARRATIVE DATABASE (BUN-D) OVERVIEW

The Narrative database is used to capture and report performance measures, as well as to collect data such as the division/department description, objectives, services provided, prior year achievements, significant budget changes, and volunteer information.

ACCESSING THE SYSTEM

From the CityLink intranet home page, click on 'Budget'

Once you are directed to the new 'COS BDMS' (City Of Scottsdale Budget Development and Management System) database, click the [Run] button.

When you click 'Run', the Scottsdale Budget Development and Management System will appear with the following sections available based on your security level that is defined by your divisional liaison or the budget office. To begin work on your budget narrative sections, click on 'Budget Development' and from the drop down menu select 'Narratives'.

1) Operating Budget Management – adopted/approved budgets are managed
2) CIP Management – adopted Capital Projects are managed
3) Budget Development - future fiscal year budgets are developed
4) Administration - allows liaisons to manage the security for all applications
5) Exit - takes the user out of the Budget Development and Management System
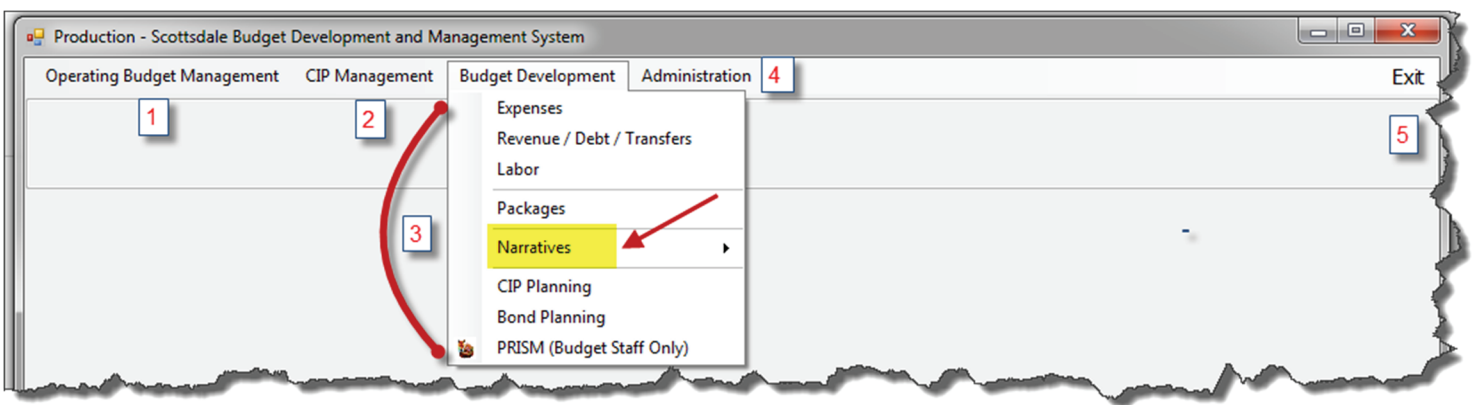
Two options will appear. The first option titled 'Divisions' is where liaisons will enter their division summary information and all pertinent data in BUN-D (**BU**dget **N**arrative **D**atabase). The second option titled 'Budget By Fund' includes a five-year historical summary for revenues and expenditures that will be completed by the budget office. Select the first option 'Divisions' to begin your data entry**.**
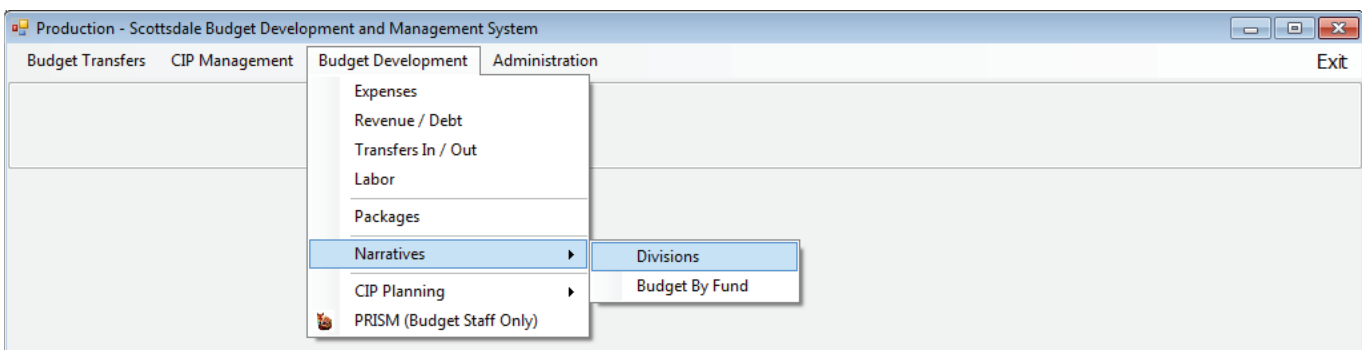
DIVISIONS

The 'Divisions' option takes you to the screen below:
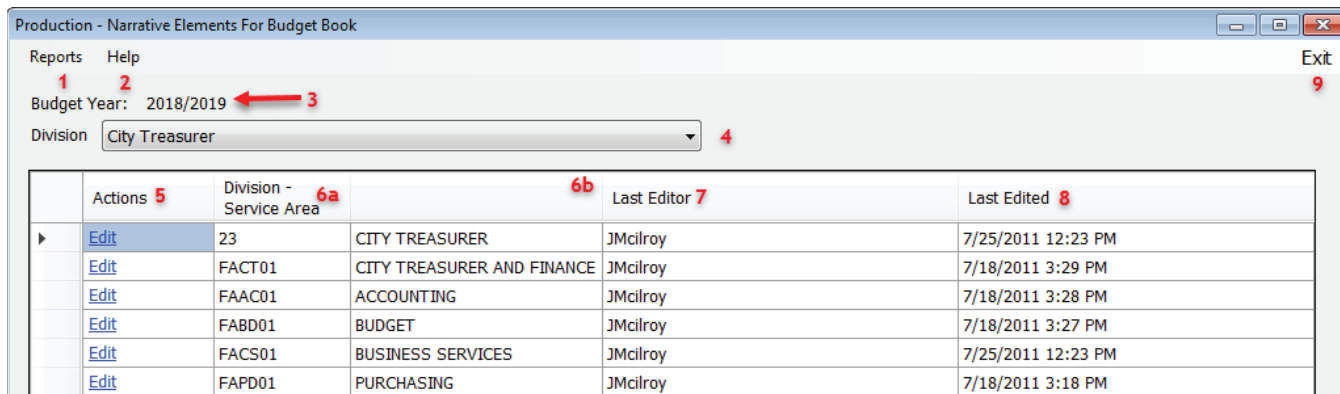
On this screen you'll find:

1) Selecting 'Reports' from the Menu bar will open the Report Manager window where the reports are located.

2) The 'Help' option will direct you to this user manual.

3) The Fiscal Year we are preparing the budget information.

4) Division drop down menu (note: based on your security level this will default to your division).

5) The 'Actions' column houses the **Edit** hyperlink which, when selected, will direct you to the Division specific or Department specific information to be updated.

6) Division – Service Area
   a. Displays division and department numbers.
   b. Displays the name of the division and department associated with column 6a.

7) Last Editor shows which user was the last to update the associated division or department data. This column is used for control purposes.

8) Last Edited displays the day and time the 'Last Editor' updated their entry.

9) Click on 'Exit' to return to the main screen of the Budget Development and Management System.

Each row corresponds to a different section of the Budget Narrative and is made up of 10 different components.
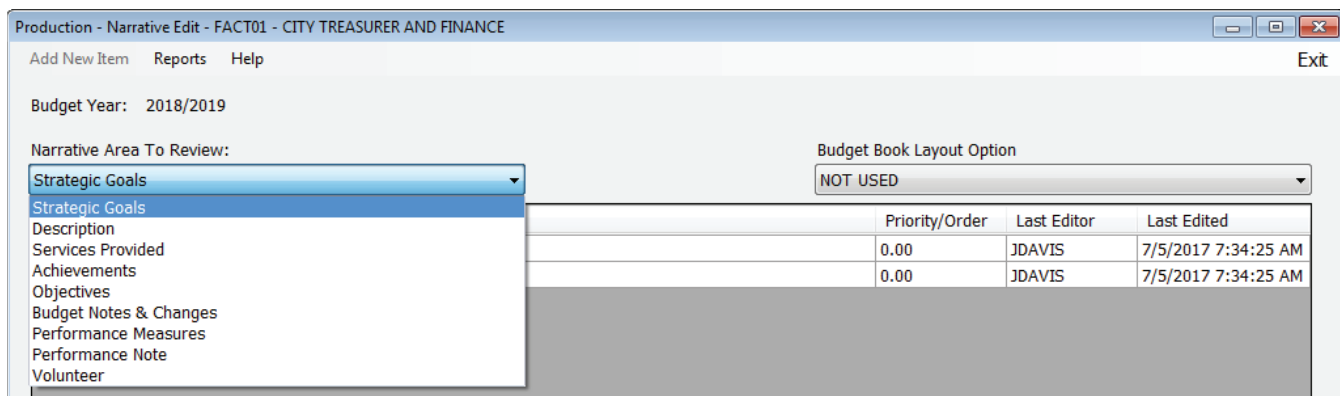
To begin updating budget narrative information click on **Edit** in the row you wish to update. The following screen will appear:

NARRATIVE AREAS TO REVIEW

As previously stated, the drop down menu will direct you to the area you wish to edit. Please note all 'Narrative Areas To Review' will have on the screen a defintion and/or an example of what is being requested.

On this screen the following fields will display:

1) Displays the Division/Department currently being edited.
2) Selecting 'Reports' will open the Report Manager window where the reports are located.
3) The Help option will direct you to the user manual.
4) The 'Actions' column houses the 'Edit' hyperlink and, when selected, will direct you to the Division or Service Area specific information to be updated/edited.
5) 'Narrative Item', the strategic goal your division/service area most closely supports.
6) The 'Priority/Order' is the order the information will appear in the Budget Book. For Strategic Goals, this is not applicable as the Strategic Goals will be shown alphabetically.
7) Last Editor shows which user was the last to update the associated division or department data. This column is used for control purposes.
8) Last Edited displays the day and time the 'Last Editor' updated the entry.
9) 'Budget Book Layout Option' currently only defaults to 'Not Used'.
10) 'Exit' will take you back to the previous screen.
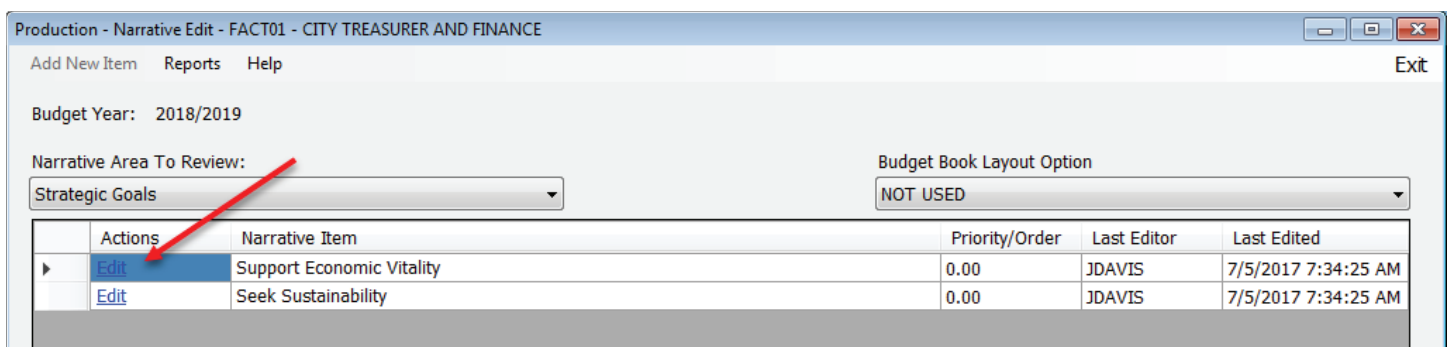
To begin your updates click on 'Edit' located in the 'Actions' column (as shown on the previous page).

Strategic Goals

The Strategic Goals consistent with the General Plan and CityShape 2020, are as follows:

- Support Economic Vitality
- Enhance Neighborhoods
- Preserve Meaningful Open Space
- Seek Sustainability
- Advance Transportation
- Value Scottsdale's Unique Lifestyle and Character

Click the **Edit** option to access the Strategic Goals edit screen.

Production - Strategic Goals - FAAC01   —   □   ✕

More Actions   Reports   Help   Exit

Budget Year: 2020/2021

Strategic Goals	Instructions **1**

Select the Strategic Goal(s) that is primarily supported by your division or department.

Advance Transportation: The transportation system must be the backbone of Scottsdale, supporting its economy and serving and influencing its land use patterns in a positive way.

Enhance Neighborhoods: Scottsdale's residential and commercial neighborhoods are a major defining element of this community. The quality of our experience as a Scottsdale citizen is expressed first and foremost in the individual neighborhoods where we live, work, and play. Scottsdale is committed to maintaining and enhancing our existing and future neighborhoods. Development, revitalization, and redevelopment decisions, including rezoning and infrastructure planning, must meet the needs of our neighborhoods in the context of broader community goals.

Preserve Meaningful Open Space: The city of Scottsdale is committed to promoting the acquisition, dedication, and setting aside of open space as a community amenity and in support of the tourism industry in Scottsdale.

Seek Sustainability: Scottsdale is committed to the effective management of its finite and renewable environmental, economic, social, and technological resources to ensure that they serve future needs.

Support Economic Vitality: Scottsdale is committed to the goal of supporting its existing economic strengths by: targeting new opportunities which can diversify our economic base; providing for the fiscal health of the city; and forming partnerships with the community which strengthen our ability to meet this goal.

Value Scottsdale's Unique Lifestyle and Character: Scottsdale offers a superior and desirable Sonoran Desert lifestyle for its citizens and visitors. The preservation of this unique lifestyle and character will be achieved through a respect for our natural and man-made environment, while providing for the needs of our citizens.

1) The 'Instructions' tab show information about the different strategic goals.

2) As shown above, the 'Strategic Goals' tab select the Strategic Goal(s) that your division or department supports.
3) The 'Priority/Order' function is typically used to order the information as it will appear in the budget book. However, for Strategic Goals, this is not applicable as the order defaults to alphabetical.
4) Select the 'Include with Division' box for the goal to be included with the Division's Goal Summary.
5) Once updates have been made, click the 'Save' button (located at the bottom right hand corner to capture your changes.
6) Select 'Exit' (located in the top right hand corner) to return to the previous screen.
7) These selections once made, do not change very often year over year.

Description

In paragraph form (no more than 5-7 sentences), succinctly describe the services provided by your division or department. The first sentence of the description should always start with the division or department name, and identify the major organizational units within the division or department. Each subsequent sentence should describe the services provided by that department or center.
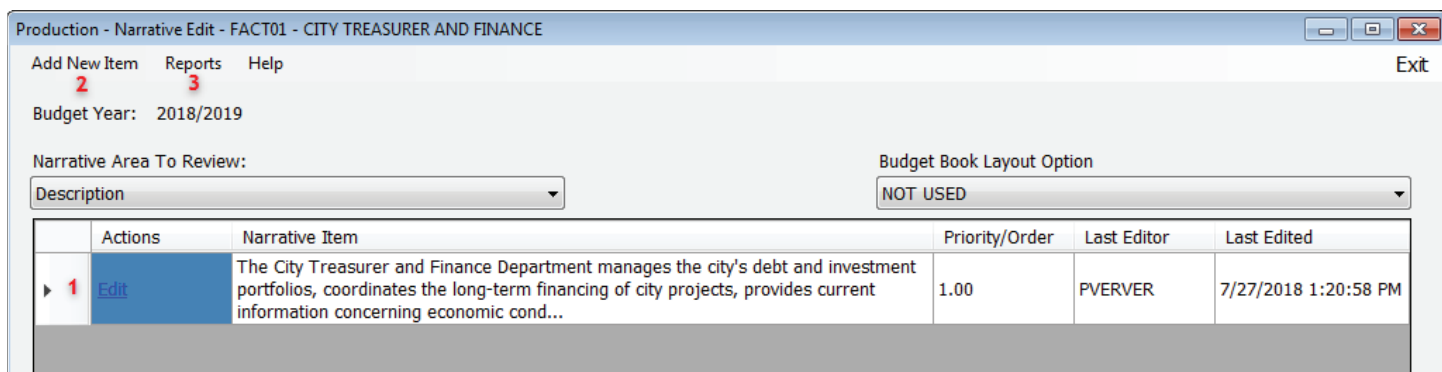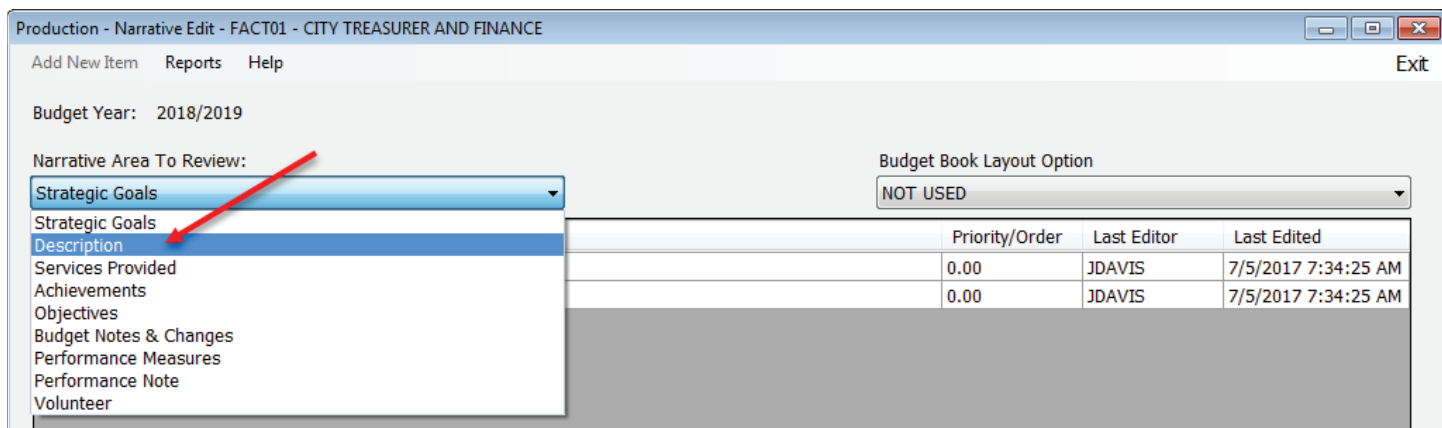
(1) Selecting 'Edit' will direct you to the data screen and allow you to edit any existing data. (2) Selecting 'Add New Item' will allow you to add information to a division or department. (3) Selecting 'Reports' will open the Report Manager window where the reports are located.

Production - Description - FAAC01   — ☐ ✕

More Actions   Reports   Help   Exit

Budget Year: 2020/2021

Description | Instructions   **1**

In paragraph form (no more than 3-4 sentences), factually describe the high-level organization structure of your division or department. If you have a mission statement, use that as the opening sentence, then identify the major organizational units within the division or department.

Example: "The Police Department provides efficient and effective police service throughout the community. The Police Department confronts community crime, responds to community needs and actively seeks citizen involvement and partnerships. The department consists of four areas: Office of the Police Chief, Uniformed Police Services, Investigative Services and Operational Support."

(1) The tab titled 'Instructions' will provide the definition and/or example of the information needed.

Production - Description - FAAC01   — ☐ ✕

More Actions   Reports   Help   Exit

Budget Year: 2020/2021

2 Description | Instructions

The Accounting Department maintains the financial integrity of the city through effective fiscal oversight. This is achieved by implementing essential accounting policies, procedures, systems and fiscal controls for all general ledger activity to fairly and accurately report financial information to stakeholders. Accounting provides training and guidance to staff regarding financial controls, laws, policies and ensuring compliance with generally accepted accounting principles. Accounting is also responsible for producing the city's annual audited financial statements; including the comprehensive annual financial report and ensuring all grants and expenditure limitations comply with Arizona Revised Statutes and city code. Additional support services include processing payments to vendors, paychecks for city employees and miscellaneous billings for amounts owed to the city.

Priority / Order

3 1.00

4 Save

Last Edited by PVERVER at 8/29/2019 1:30 PM **5**

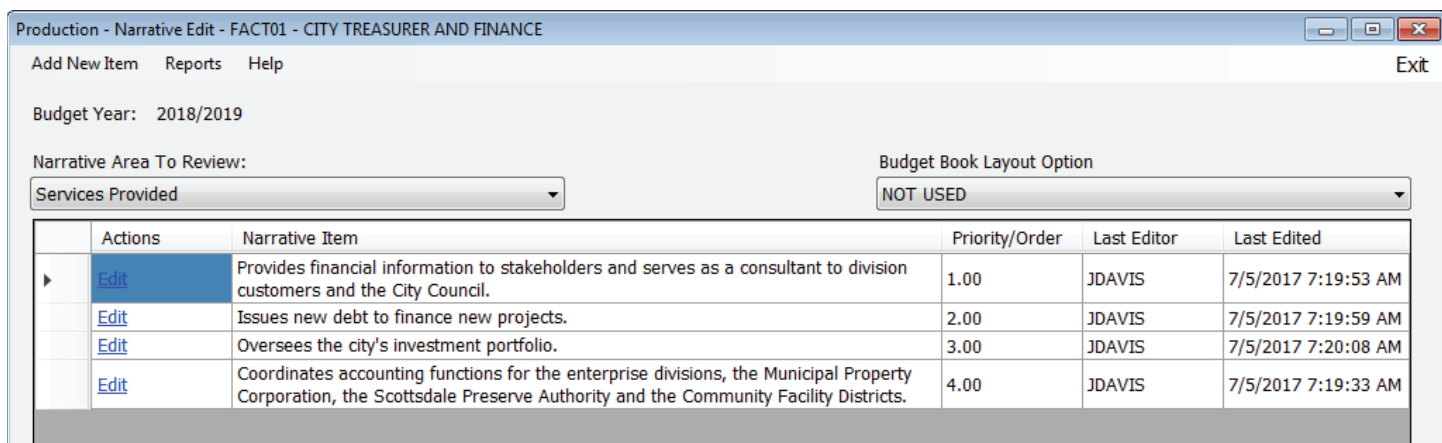(2) The tab titled 'Description' will be where you will edit/add your data. The Description field will have a spell check feature. (3) The 'Priority/Order' is the order the information will appear in the Budget Book. (4) After you make any changes select save (Bottom right hand corner of the screen). (5) Once you save, it will display the person making the change, as well as the date and time.

Services Provided

In one-sentence, identify and briefly describe each of the significant services provided by your division or department. If available and verifiable, please include the most current number of customers that benefit from that service.
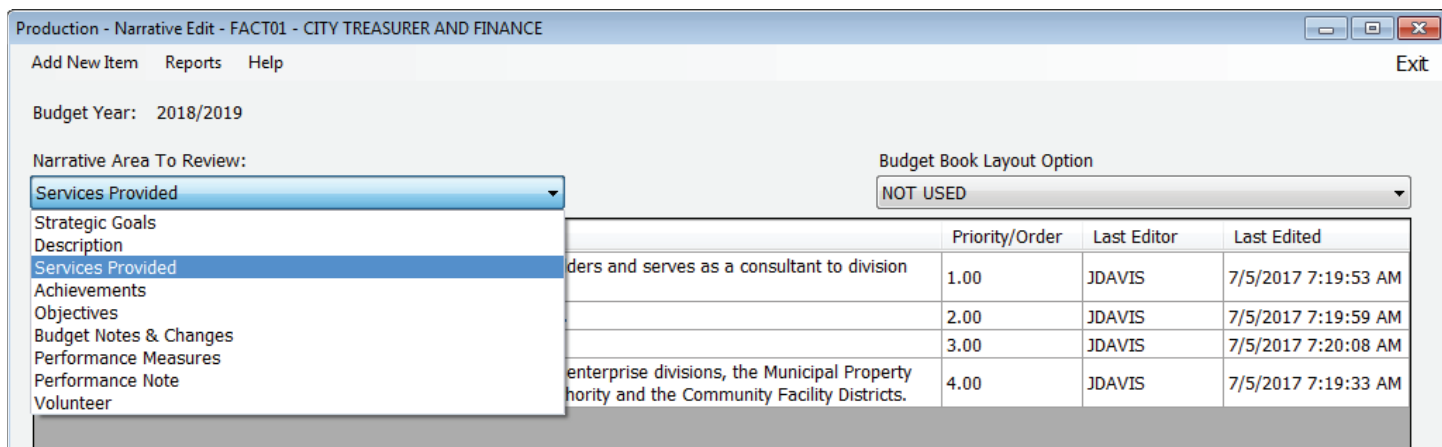
Click on 'Services Provided' from the drop down box from the 'Narrative Area to Review':

(1) The 'Instructions' tab will provide the definition and/or example of the information needed.

(2) The 'Services Provided' tab will be where you will edit/add your data. The Description field will have a spell check feature. (3) The 'Priority/Order' is the order the information will appear in the Budget Book. (4) After you make any changes select save (Bottom right hand corner of the screen). (5) Once you save, it will display the person making the change, as well as the date and time.
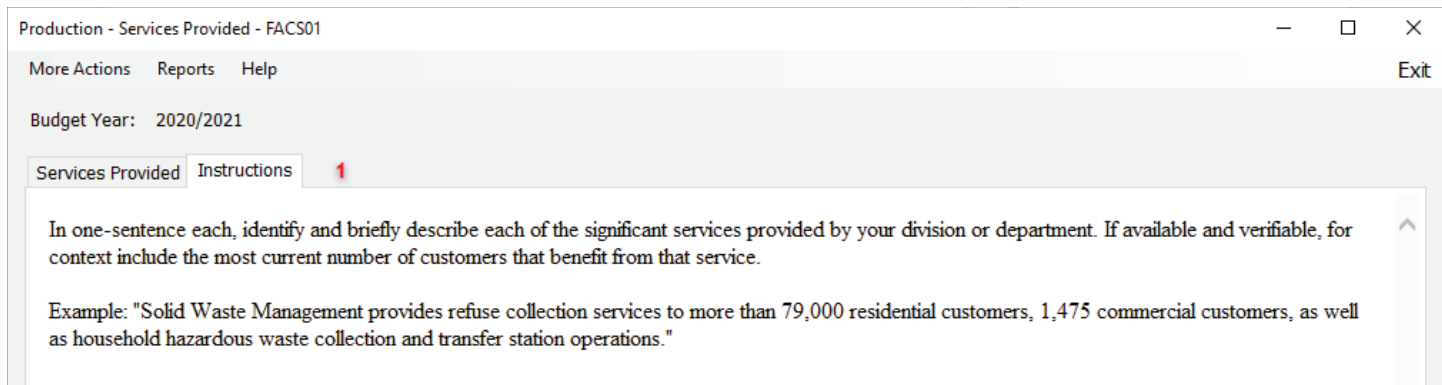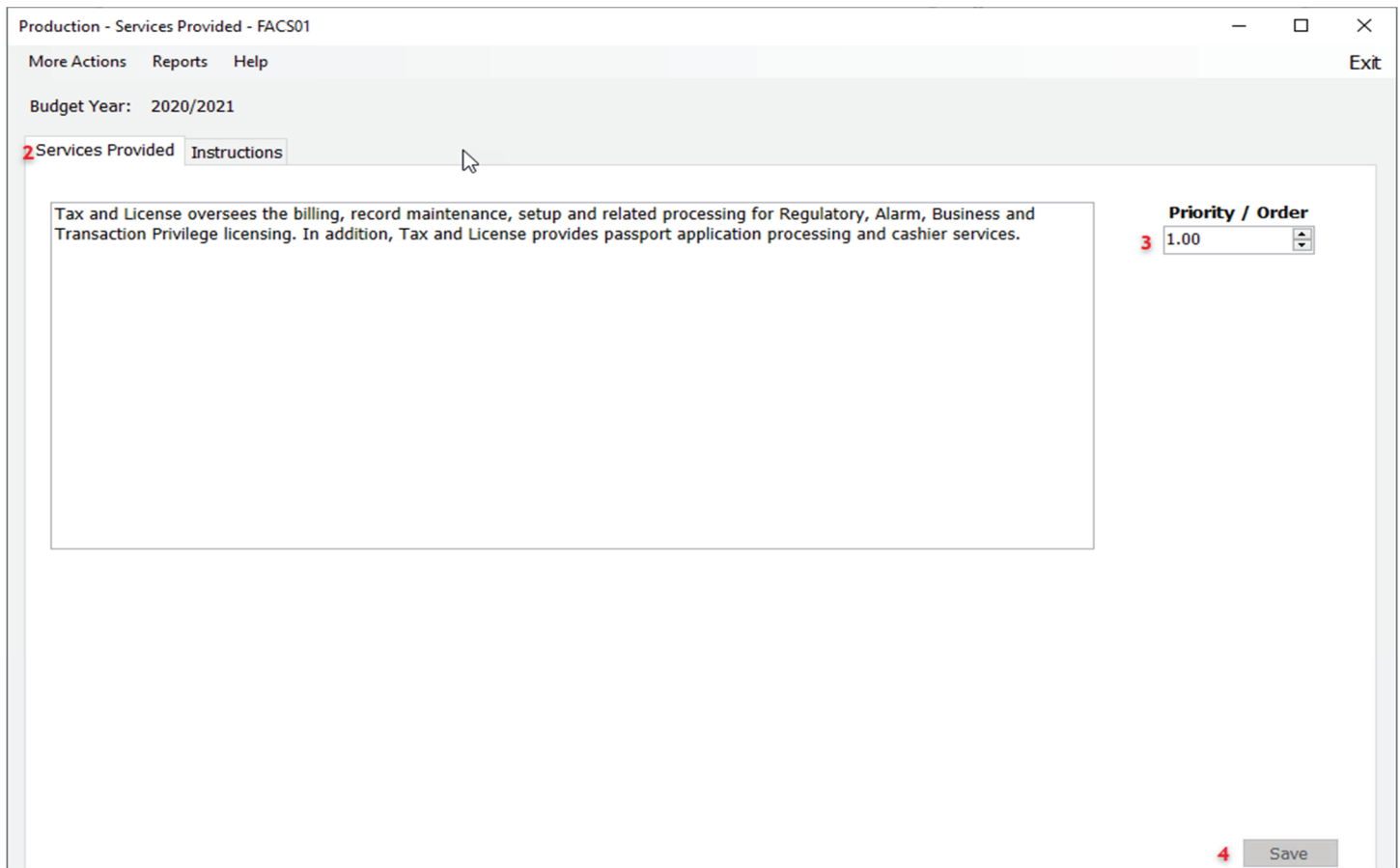

Achievements

In one sentence each: please describe the significant achievements by your division (up to 5) or department (up to 3) during the current fiscal year.

To add information to a division or department, select 'Add New Item' located on the top menu bar. To edit current data, click on the 'Edit' option.

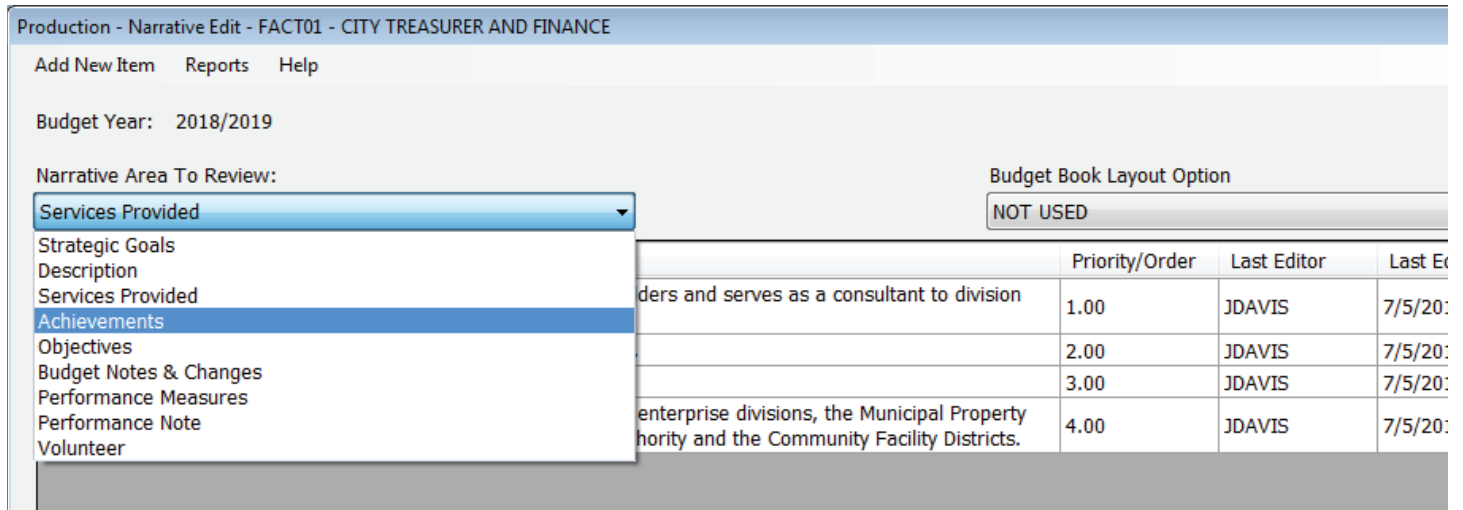(1) The first section titled 'Instructions' will provide the definition and/or example of the information needed. (2) The second section will be where you will edit/add your data. The Description field will have a spell check feature. (3) The 'Priority/Order' is the order the information will appear in the Budget Book. (4) Select the 'Include with Division' box for the description to be included with the Division's Summary. (5) After you make any changes select save (Bottom right hand corner of the screen). (6) Once you save, it will display the person making the change, as well as the date and time.

Objectives

In one sentence, identify the major objectives for your division/department in the next fiscal year. Divisions may have up to 5 objectives based on the size and diversity of the operation. Departments may have up to 3 objectives. An objective refers to something that is to be accomplished in specific, well-defined, and measurable terms and that is achievable within the next fiscal year. Objectives should support Strategic Goals.

   Objective Example: "Improve cardiac survivability through training citizens to perform bystander CPR."

Once you click on 'Objective' and the new screen displays, both the 'Add New Item' and 'Edit' option will direct you to the respective data entry screen as described previously for the other 'Narrative Area to Review' sections. The first section titled 'Instructions' will provide the definition and/or example of the information needed. The second section will be where you will edit/add your data; this field will have a spell check feature.

Lastly, the 'Priority/Order' is the order the information will appear in the Budget Book.

Click 'Include with Division' to add this information to the Division Summary.

Click 'Save' in the right-hand corner of the screen.

Budget Notes and Changes

In one-sentence each, describe significant changes to the current proposed budget under development when compared to the prior year's adopted, for example: 1) changes +/- in FTE; 2) changes >$25,000 or >10% of budget; or 3) internal/external service additions/eliminations. Details should be sufficient to help the reader understand the major changes observable in the financial or staffing section of your division or department's budget.

> *Example: "The increase in Personnel Services is due to the net effect of: 1) reducing 1.00 FTE position to part-time (0.50 FTE); 2) adding 1.00 FTE entry level Specialist position; and 3) transferring a 0.50 FTE Public Information Officer position to the Public Works Division."*

Once you click on 'Budget Notes and Changes' and the new screen displays, both the 'Add New Item' and 'Edit' option will direct you to the respective data entry screen as described previously for the other 'Narrative Area to Review' sections. The first section titled 'Instructions' will provide the definition and/or example of the information needed. The second section will be where you will edit/add your data; this field will have a spell check feature.

Lastly, the 'Priority/Order' is the order the information will appear in the Budget Book.

Click 'Include with Division' to add this information to the Division Summary.

Click 'Save' in the right hand corner of the screen.

Performance Measures

To begin adding/editing the division or department's performance measures select 'Performance Measures' from the 'Narrative Area To Review' drop down menu.

Performance measures should be linked to the services that your division or department provides, and the objectives that have been identified. For the most part, measures associated with services should remain the same from year to year for continuity purposes, but the measures associated with division or department annual objectives should change as the objectives change. Please ensure that if your division or department has a measure that is reported in the appendix of the CAFR, that it is also included in the database to be published in the budget book.

Divisions should provide 1-2 performance measures per service or objective for a total of no more than 10-12 measures depending on the size or scope of the division. Departments should provide 1-2 measures per service or objective for a total of 5-6 measures.

Both the 'Add New Item' and 'Edit' option will direct you to the screen below. The first section titled 'Instructions' will provide the definition and/or example of the information needed. The second section will be where you will edit/add your data; this field will have a spell check feature.

Lastly, the 'Priority/Order' is the order the information will appear in the Budget Book.

1) The tab titled 'Instructions' will provide the definition and/or example of the information needed.
2) The 'Performance Measures' section is where the user will identify the measure
3) The 'Priority/Order' function is used to order the information as it will appear in the Budget Book
4) Select the 'Include with Division' box for the goal to be included with the Division's Goal Summary.
5) Select the 'Strategic Goals' that your measure supports.
6) The 'Measure Config Name' section is the description for the type of identified measure that will be reported
7) 'Category' – Select one of three different types of measures:

   - ***Workload*** *or output measures measure the amount of work produced or services delivered.*
   - ***Efficiency*** *measures measure the amount of work done per amount of resources used*
   - ***Effectiveness*** *measures are the amount of achieved results*

8) Use the Note field, in 200 characters or less, to explain trend changes, benchmarks used and why, and any additional pertinent information related exclusively to the Performance Measure identified in 1). This section only displays the first line of information. Click in the field for a separate data entry screen to view/edit the entire note.
9) The 'Past Time Periods' section header description.
10) 'Actual 2017/18' the actual number from the previous year.
11) 'Actual 2018/19' the actual number from the previous year.

12) 'Last Year Projected 2019/20' is what was originally projected at the beginning of the fiscal year.
13) 'Estimated 2019/20' the estimate number for the used at the beginning of the fiscal year.
14) 'Projected 2020/21' is where you project what you anticipate the subsequent budget year will be.
15) 'Select the numeric format you will need that will be displayed for that performance measure (Decimals, Percentage %, Numeric $)

Chart Information

Performance measures should be linked to the services that your division or department provides, and the objectives that have been identified. For the most part, measures associated with services should remain the same from year to year for continuity purposes, but the measures associated with division or department annual objectives should change as the objectives change. Please ensure if your division or department has a measure that is reported in the appendix of the CAFR, that it is also included in the database to be published in the budget book.

Divisions with 3 or fewer departments can continue to use up to 3 charted measures.

Divisions with 4 or more departments can now use up to 6 charted measures.

Chart Performance Measures will feed the quarterly performance measures report that is distributed to City Council.

16) 'Chart Title' – brief title that will appear at the top of the chart in the budget book
17) 'Y Axis Label' – if you wish to include a target line, describe your target briefly here

18) 'Chart Target Label' – using the same type of value as displayed in the chart (numeric or percent), enter the value

19) 'Chart Target Value' - Enter a value to determine where you want charted targeted values to display on the graph.

19) 'Chart Scale Value' – Enter a value to determine where you want charted values to display on the graph. This value will set a new top value, and will override the auto scale function. The bottom value will always be 0. If this value is not supplied, or the value is not numeric, the graph will default to auto scale. This is helpful for making multiple graphs with the same data type appear correct in relation to one another by setting the scale to the same value on both items.

Click 'Include with Division' to add this information to the Division Summary if desired.

Another feature that had been added is the ability to preview the data before it is saved and without leaving the screen. This way you can verify what the chart will look like.

Instructions

Performance measures should be linked to the services that your division or department provides and the objectives that have been identified. For the most part, measures associated with services should remain the same from year to year for continuity purposes, but the measures associated with divisional or departmental objectives would logically change annually. Please ensure that if your division or department has a measure that is reported in the appendix of the CAFR that it is also included in the budget book. Division performance measures (either charted or in tables) will be included and reported on in the quarterly performance report.
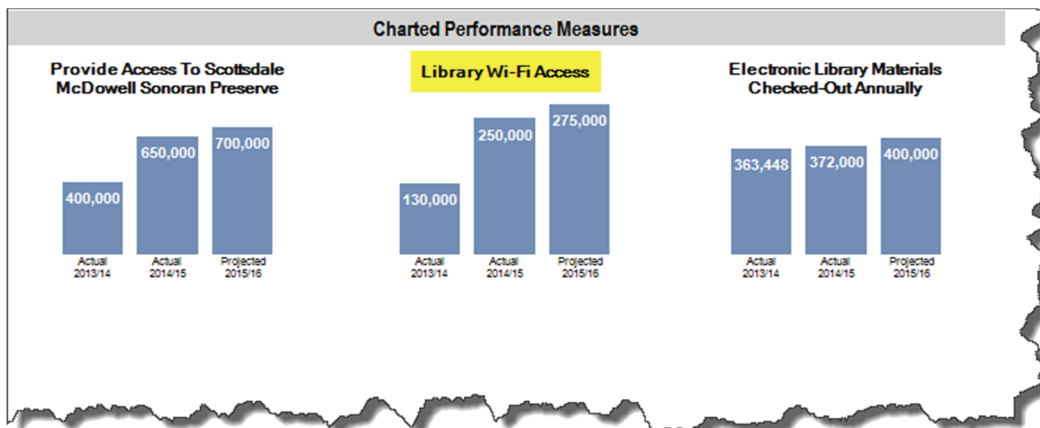
Chart Performance Measures   **Priority / Order**

Number of people accessing Wi-Fi annually at city's 5 libraries   2.00

Preview Data

Charted Performance Measures

Provide Access To Scottsdale McDowell Sonoran Preserve

700,000
650,000
400,000

| Actual 2013/14 | Actual 2014/15 | Projected 2015/16 |

Library Wi-Fi Access

275,000
250,000
130,000

| Actual 2013/14 | Actual 2014/15 | Projected 2015/16 |

Electronic Library Materials Checked-Out Annually

400,000
372,000
363,448

| Actual 2013/14 | Actual 2014/15 | Projected 2015/16 |

Performance Note

Performance Notes are designed to use as explanations for comments impacting multiple measures. This section/function is differnet than the notes in 'Performance Measures' section (See #5) which are used to explain or clarify an individual 'Performance Measure'.

Currently, only two divisions/departments use this function as there are national standards these divisions are referencing or explaining.

- The Court uses the ten performance measures created by the National Center for State Courts called CourTools ©and references this at the bottom of the section in the budget book.
- Public Safety – Police has the following 'Performance Note', as well:

    "These statistics are representative of core measures for law enforcement agencies as recommended by the International City/County Management Association's Center for Performance Measurement. These same measures are used to identify, prevent and reduce crime in the City and are submitted to the federal government to compile National Uniform Crime Reporting. Measures are reported on a calendar year basis."

Volunteer

For each significant group of volunteers summarize the work that they do, the number of volunteers, and the number of volunteer hours. The value of volunteer hours will be automatically calculated at a standard rate using the most current data from IndependentSector.org and the full-time equivalents (FTE) will be calculated automatically by dividing the total number of volunteer hours by 2,080.

Click on 'Volunteer' from the 'Narrative Area to Review:' drop down menu.

Once you click on 'Volunteer' and the new screen displays, both the 'Add New Item' and 'Edit' option will direct you to the respective data entry screen as described previously for the other 'Narrative Area to Review' sections. The first section titled 'Instructions' will provide the definition and/or example of the information needed. The second section will be where you will edit/add your data; this field will have a spell check feature.

1) Summarize the work each significant group does.
2) The 'Priority/Order' function is used to order the information as it will appear in the Budget Book.
3) Select from the drop down whether the type is a general 'Volunteer' or on a Council elected 'Board/Commission'.
4) Enter the number of volunteers for the significant group.
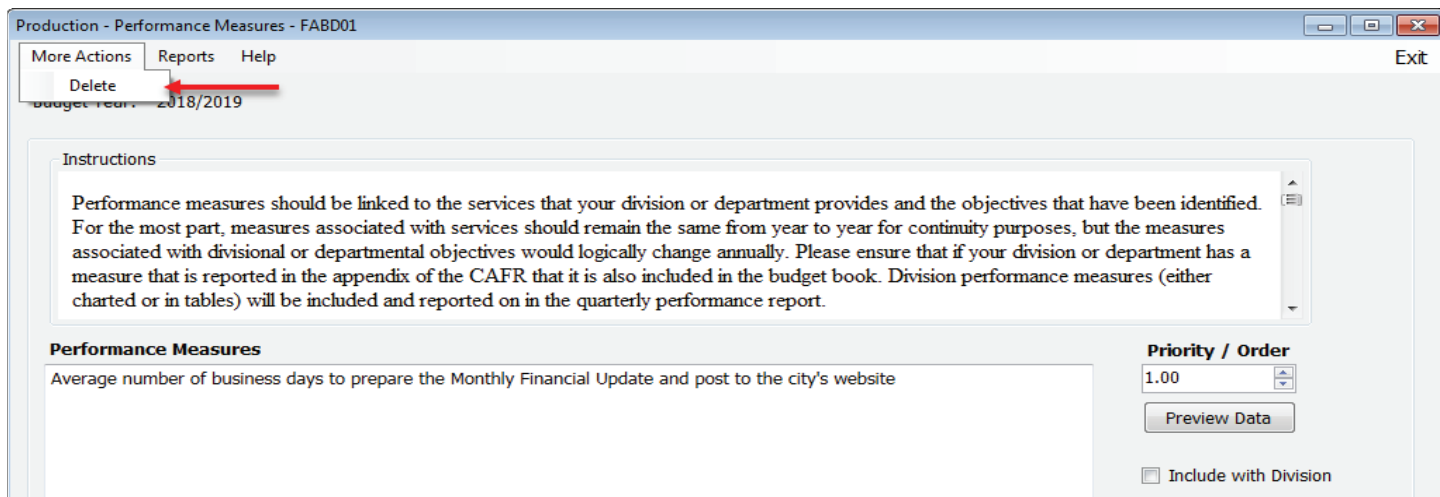5) Enter the number of hours in the 'Volunteer Hours' field.

Click 'Save' in the right hand corner of the screen.

Delete

Every 'Narrative Area To Review' section will have a delete option. To delete data select the Click **Edit** on the data you would like to remove.
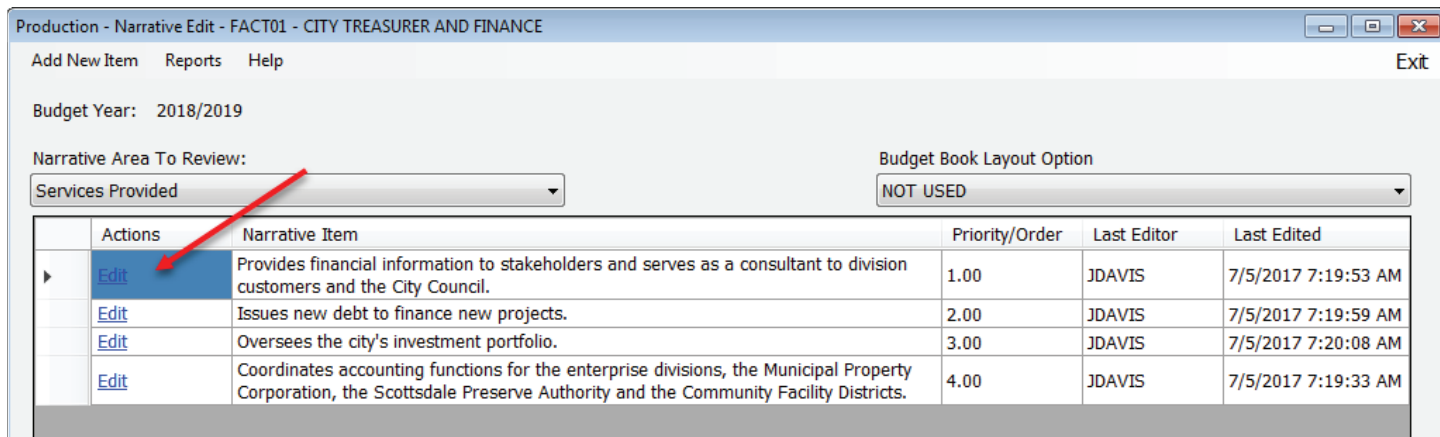
Once you are directed to the screen with the data, select the Delete option from the 'More Actions' drop down menu.
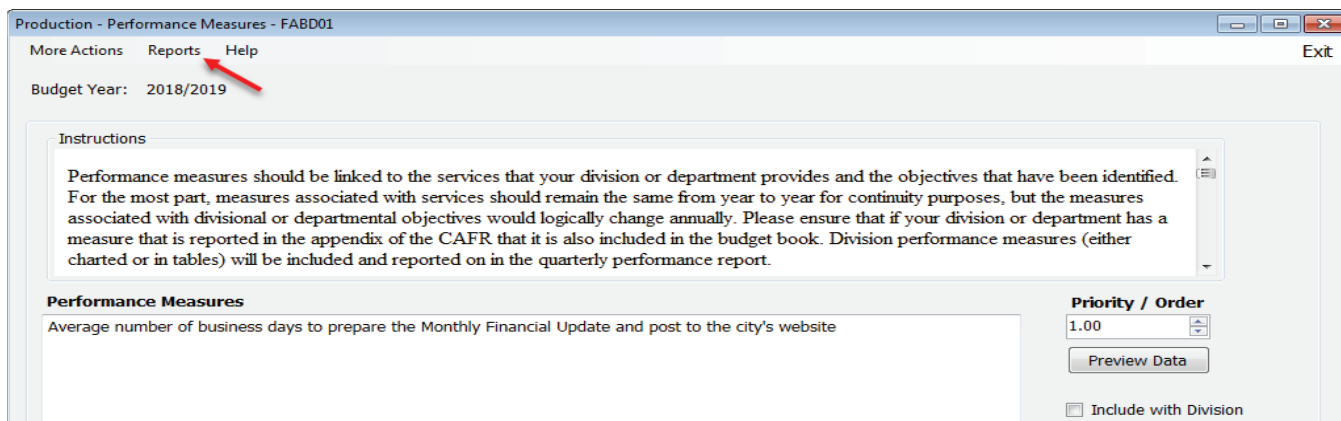

 A confirmation pop up action will appear, click the Yes button to permanently delete the data or No if you wish to cancel the delete request.
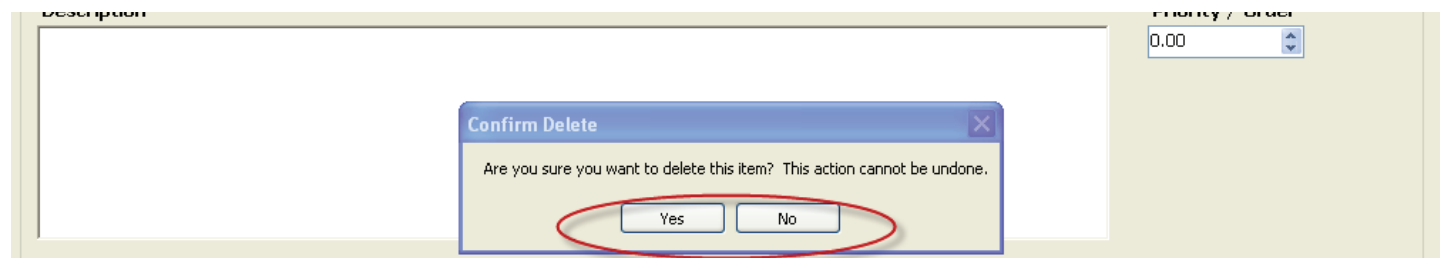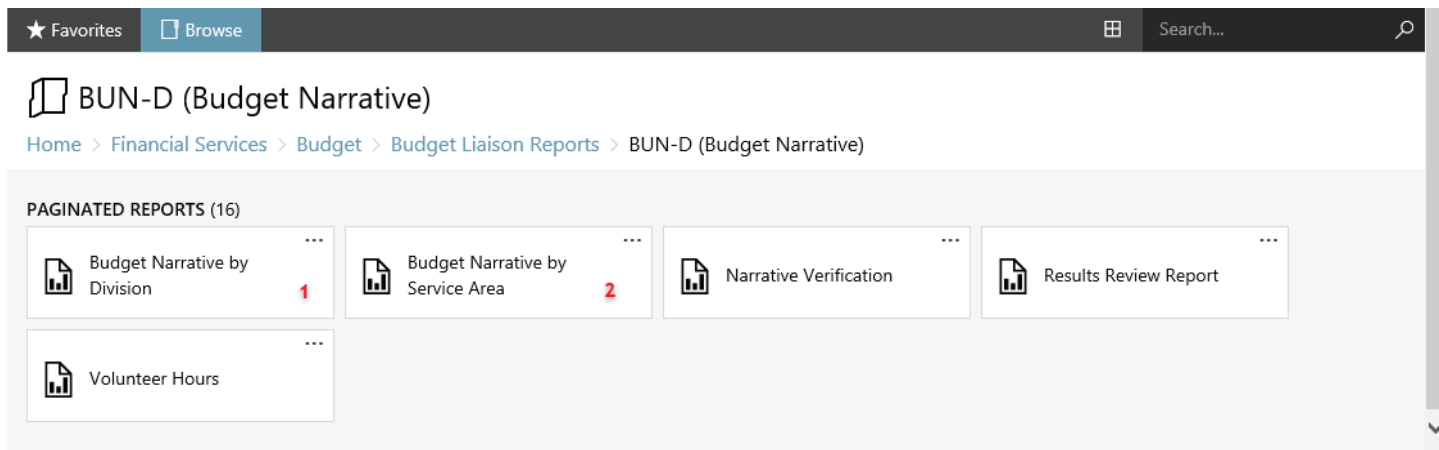
REPORTS

Selecting 'Reports' from the Menu bar will open the Report Manager window where the reports are located.

Click on the 'Budget Narrative Report by Division' **(1)** to review the budget information you entered into the Budget Narrative Database by Division or Budget Narrative Report by Service Area' **(2)** to review the budget information you've entered into the Budget Narrative Database by department.

Select the division or department you would like to run a report for from the 'Selection' drop down menu (as shown in example below). Click [View Report] to run the report.