



NLC CITY SUMMIT

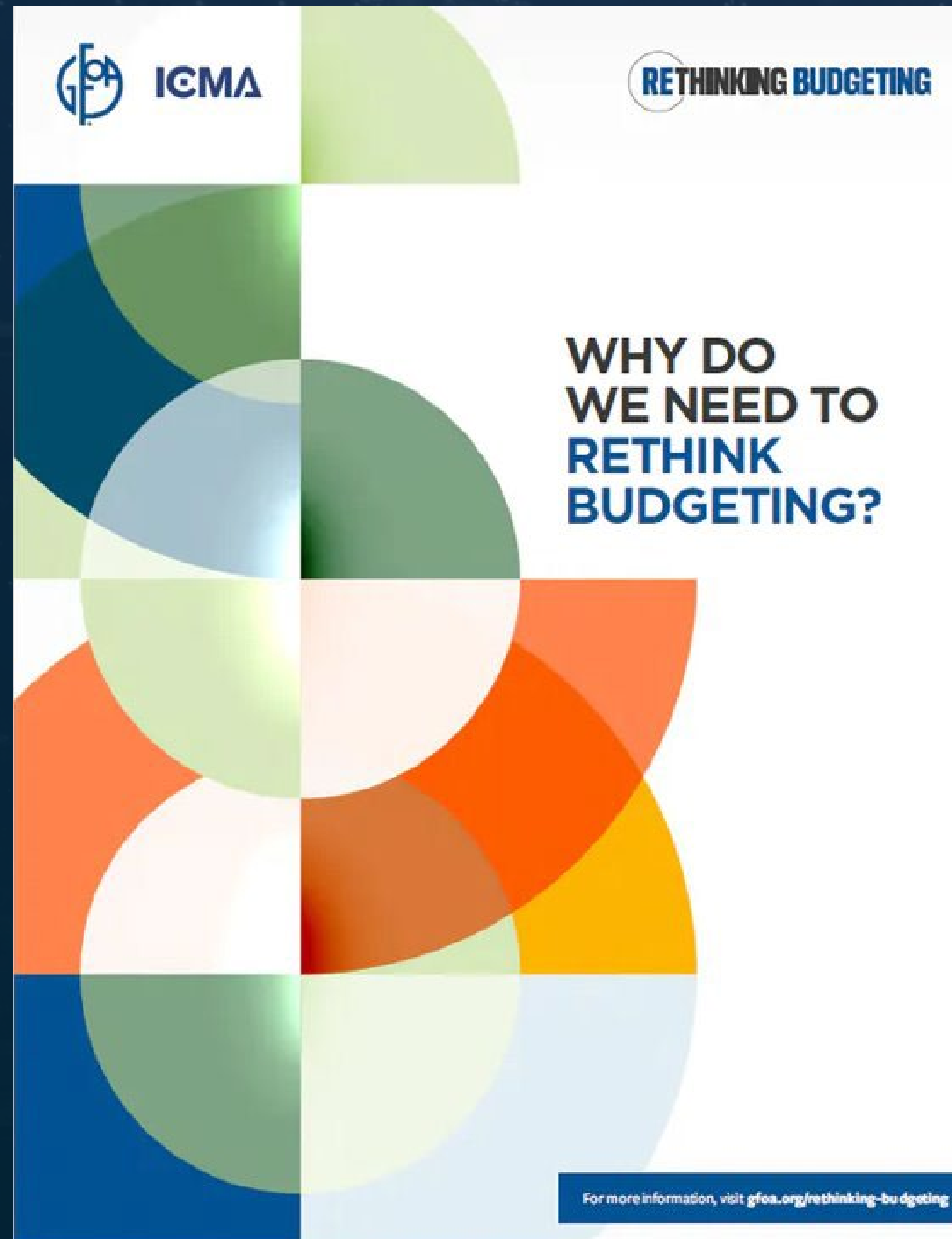
Smarter Budgeting with AI:
UNLOCKING INSIGHTS FOR PUBLIC SECTOR IMPACT



Jesse Muniz

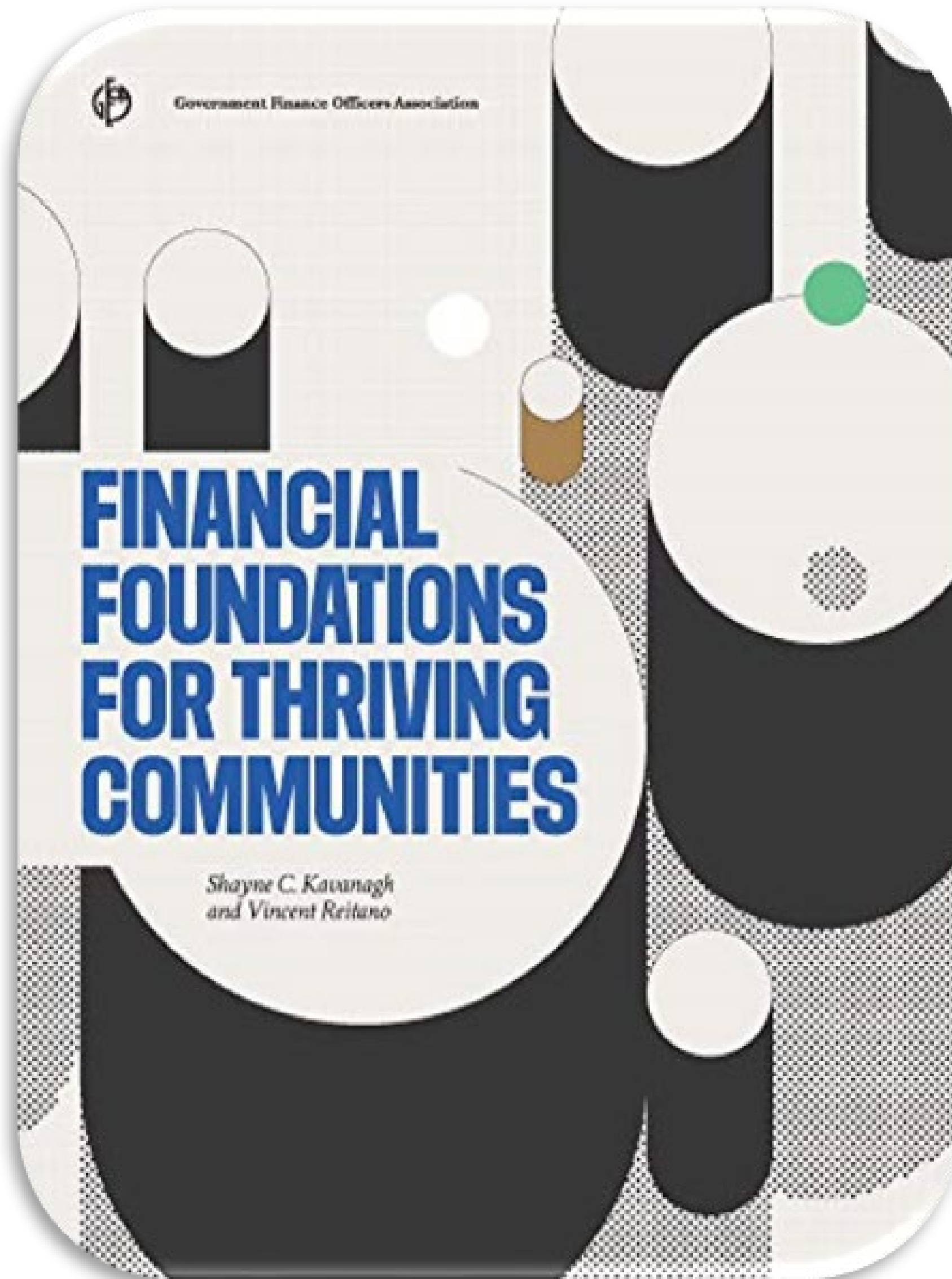
Head of Client Success – Priority Based Budgeting

Tyler Technologies



“The challenges facing today’s leaders require **something different** from our budget process.”

NLC



Josh Schoemann

County Executive
Washington County, WI

“Through priority-based budgeting, Josh cut excess programs and has reallocated nearly 15 percent of the budget. Josh and his team have a fully funded road construction plan until 2050—without raising taxes.”

PRIORITY BASED
BUDGETING

Methodology & Plan

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Priority Based Budgeting Blueprint for Funding the Future

We Have New Needs WE WANT TO:

Launch new programs to tackle emerging challenges

Enhance current programs that need more resources

We Don't Have New Needs WE WANT TO:

Maintain/preserve current services

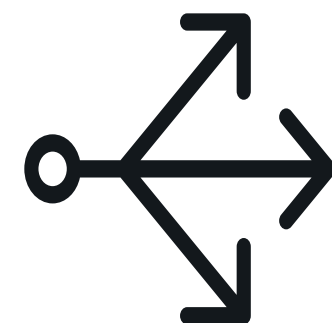
Seek to lower tax rates or refund tax-payers

HOW TO REACH THE ABOVE GOALS

FREE UP & REALLOCATE RESOURCES



SOURCING

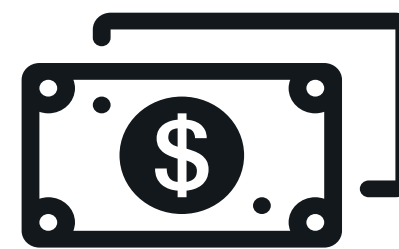


EFFICIENCIES



SERVICE
LEVELS

GENERATE NEW REVENUE



FEES &
CHARGES



GRANT
FUNDING



TAXES/RATES

The Methodology

Answer three questions with data and make strategic budget decisions based on the answers.

1

What do we do?

Or, what services do we provide? You'll be able to answer this question by creating a Program Inventory.

2

How much does it cost to provide these programs?

Program costing will give insight into the bottom line of time, personnel, and materials (offset by any revenue) so that organizations can have an actual cost and dollar figure for your services.

3

What do these programs provide?

With program scoring, evaluation of programs discovers relative alignment with strategic plans or goals, legal mandates, and service demand.



See it in Action

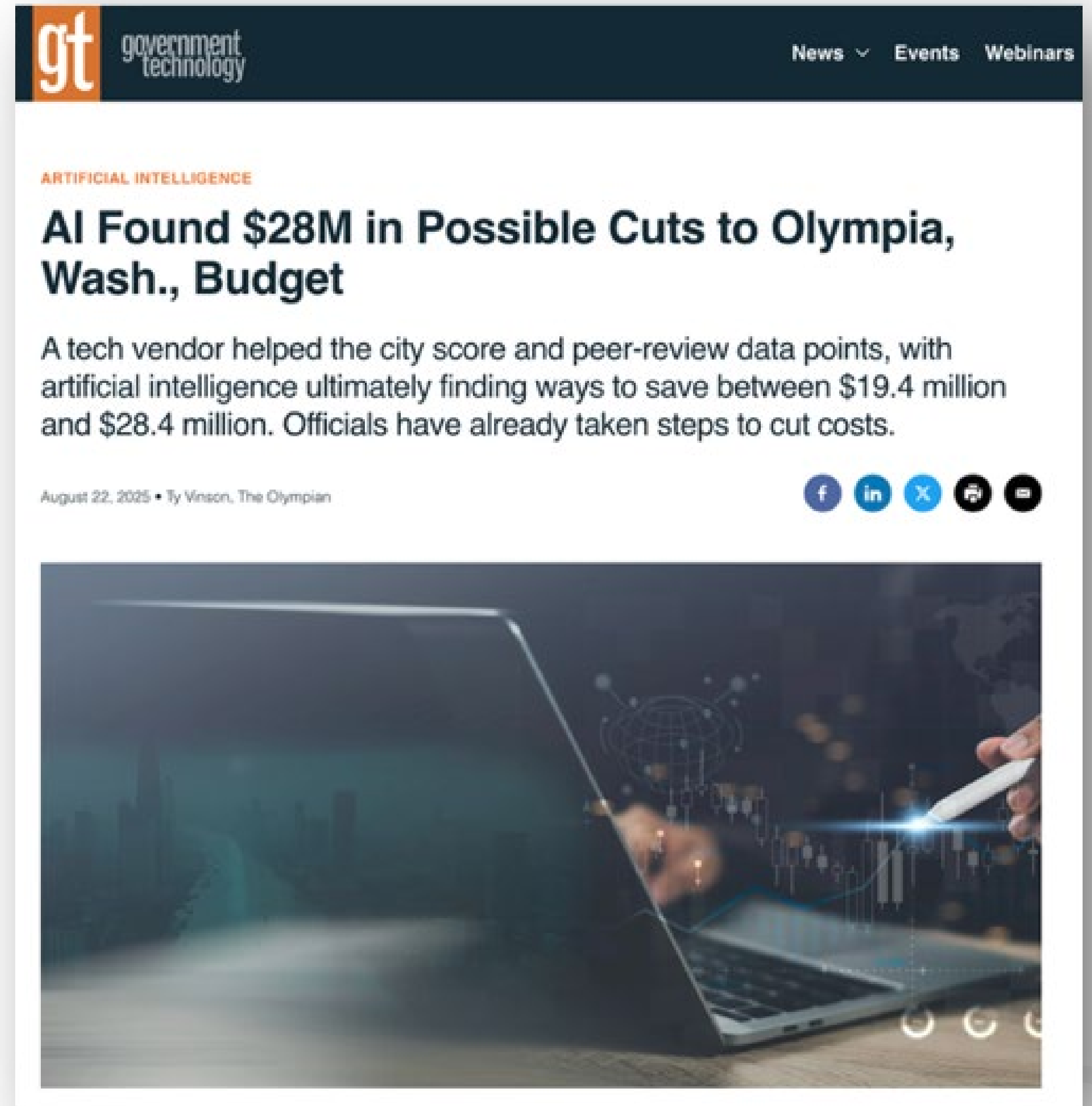
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Olympia, Washington Priority Based Budgeting Insights

\$28M in Opportunities on a \$114M General Fund

"It helps us tell the story of what we do, why we do it, and how much it costs to do that. It also provides a framework for decision makers to evaluate how we use those resources to explore new revenue, cost saving measures and those types of things."

Debbie Sullivan, Finance and Budget Director





"I am pleased to submit the recommended FY 2025 balanced budget for your review and endorsement.

Moving forward in the budget process, staff will continue to leverage the priority-based budgeting approach while reviewing identified areas of interest."

– Amy Patterson, County Manager

Collier County, Florida

With an annual operating budget of \$673M, they identified approximately 22% of the budget that could be reallocated.



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Collier County, Florida

With an annual operating budget of \$673M, they identified approximately **22% of the budget that could be reallocated.**

IDENTIFIED

»»» \$73M

IN RESOURCE
ALLOCATION
OPPORTUNITIES

»»» \$8M

IN ENTREPRENURIAL
REVENUE-
GENERATING
OPPORTUNITIES

Resource Reallocations*

	% OF BUDGET	\$ REALLOCATED
Municipality in Colorado	10%	\$9,014,071
City in Georgia	10%	\$7,988,116
Municipality in Colorado	9%	\$2,924,895
City in Texas	8%	\$8,330,691
City in Michigan	8%	\$9,101,757
City in Michigan	7%	\$3,872,182
City in Pennsylvania	6%	\$24,922,036
City in Arizona	6%	\$8,354,000
City in Michigan	6%	\$4,365,328
Municipality in Colorado	4%	\$11,470,677
City in Oklahoma	4%	\$8,115,103
County in Kansas	4%	\$14,928,811
City in Virginia	4%	\$22,832,567
City in Idaho	3%	\$2,621,640
City in Minnesota	3%	\$10,802,781
City in Alberta (Canada)	3%	\$2,692,295
City in Illinois	3%	\$774,794
City in Alberta (Canada)	2%	\$8,587,498
City in Utah	2%	\$1,696,963
City in Missouri	2%	\$1,437,712
City in South Carolina	2%	\$3,597,821
City in Alberta (Canada)	2%	\$6,735,388

*Reallocation dollar amounts are from 2021 data.



The Process & Technology

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A stylized graphic of a central square chip with the letters 'AI' in a glowing orange font. The chip is surrounded by a complex network of blue circuit lines and circular nodes, resembling a neural network or a data processing system. The background is a dark blue gradient with some abstract shapes.

The AI Process

- 1 Identify**
Programs from budget items
- 2 Forecast**
Costs and revenue allocations
- 3 Predict**
Impact on organizational priorities
- 4 Discover**
Cost savings and revenue opportunities

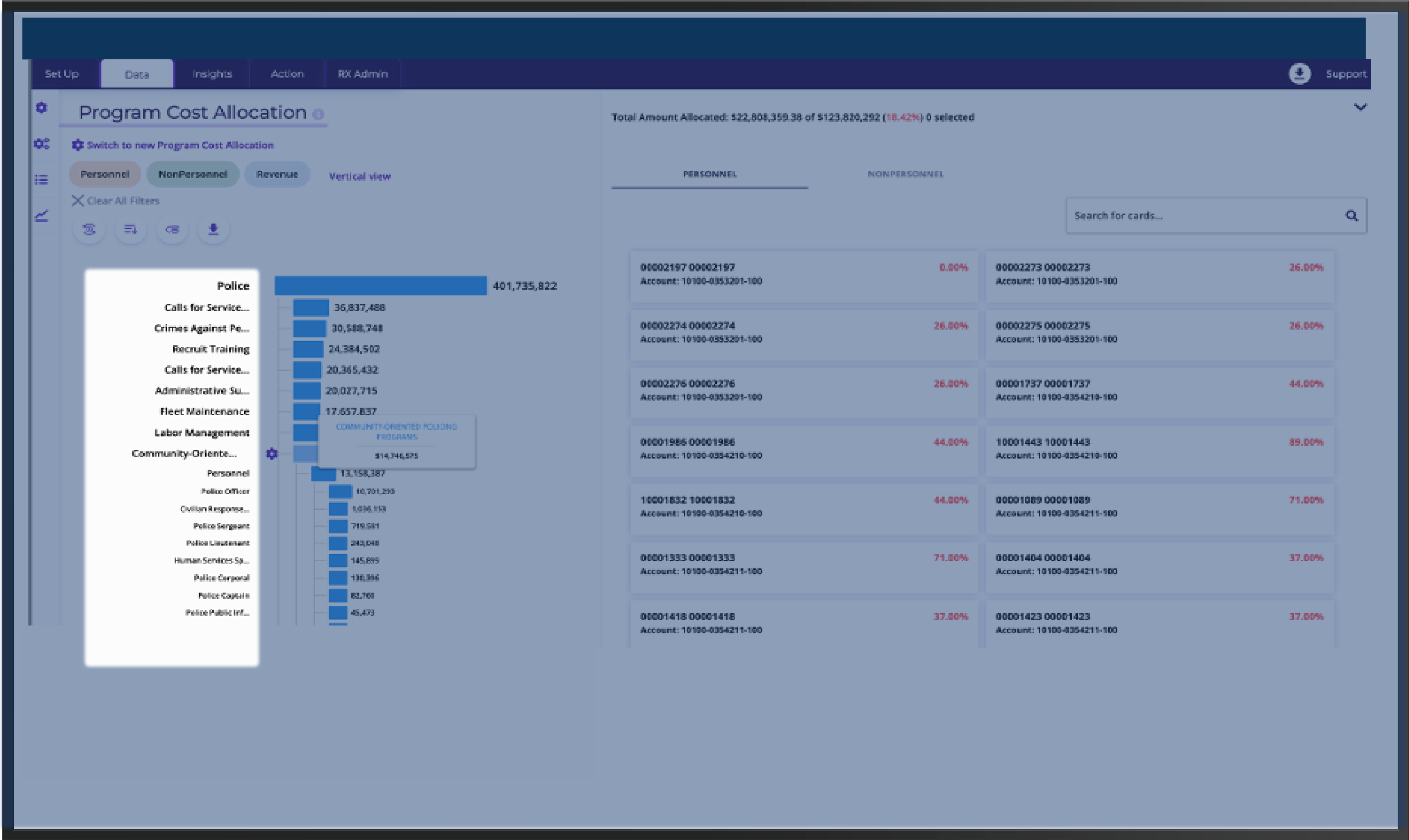
1

AI predicts the programs a local government offers by analyzing the General Ledger (GL) line-item data.

1

Predicting the Inventory of Programs

IDENTIFY: PROGRAMS FROM BUDGET ITEMS



AI predicts the programs a local government offers by analyzing the General Ledger (GL) line-item data.

2

Predicting Program Costs and Revenue Allocation

FORECAST: COSTS AND REVENUE ALLOCATIONS

Machine learning techniques predict the costs of providing these programs and their cost-recovery.

jupyter CST Program Costing Nearest Neighbors Last Checkpoint: 01/04/2024 (autosaved)

File Edit View Insert Cell Kernel Help

Python [conda env:tensorflow_python3.8.10]

Memory: 336.8 MB

Load Program and Position key files:

These files define which programs the costs should be allocated to

In [17]:

```
predictions_todo, predictions_all = load_key_files(
    position_keys_file, position_context,
    position_keys_reference, position_keys_user_group,
    program_keys_file, program_context,
    program_keys_reference, program_keys_user_group,
    key_dir='./map_files/', cost_type='Personnel')
```

In [74]:

```
ind = 0
example = predictions_todo['Position'].values[ind]
key = predictions_todo[predictions_todo['Position']==example]['key'].values[ind]
print('Example check: We will estimate the allocations of this Position:')
print(example)
print('To these programs:')
predictions_todo[predictions_todo['Position']==example] & (predictions_todo['key']==key)
```

Out[74]:

Example check: We will estimate the allocations of this Position:
Community Outreach Coord
To these programs:

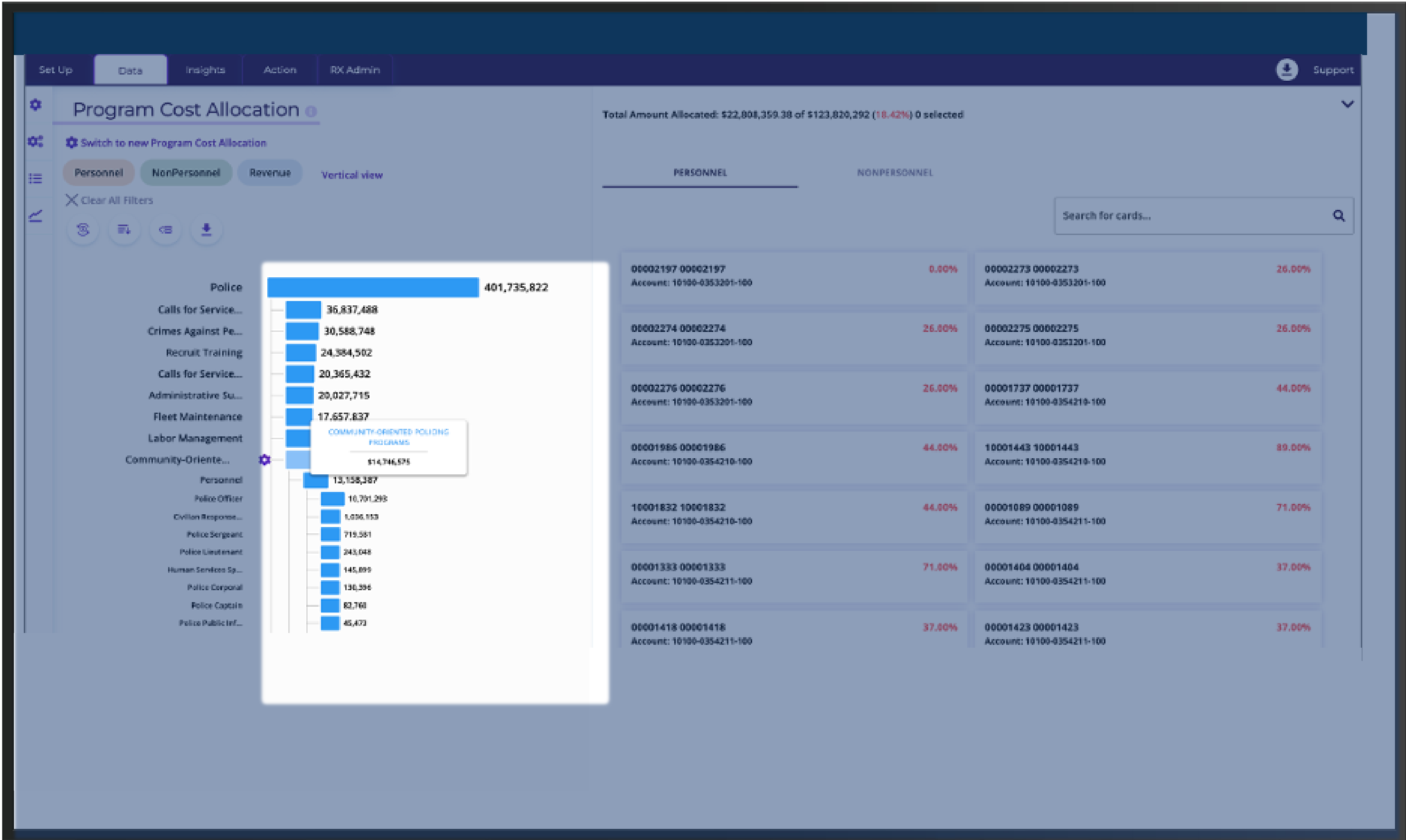
	key	ItemID	ProgID	User Group(accts)	Position	TotalCost	User Group(prgs)	ProgName	Description	position_context	program_context	key_item
0	1	11222	668	Family & Community Services	Community Outreach Coord	\$3826.23	Family & Community Services	Child support assistance	It is the mission of the Department of Family ...	Family & Community Services, Community Outreach...	Family & Community Services, Child support ass...	1_Far Corner Sen Comm O...
348	1	11222	663	Family & Community Services	Community Outreach Coord	\$3826.23	Family & Community Services	Emergency/crisis intervention such as meeting ...	It is the mission of the Department of Family ...	Family & Community Services, Community Outreach...	Family & Community Services, Emergency crisis ...	1_Far Corner Sen Comm O...
662	1	11222	669	Family & Community Services	Community Outreach Coord	\$3826.23	Family & Community Services	Facility Maintenance	Facility maintenance of Family and Head	Family & Community Services, Community Outreach...	Family & Community Services, Facility	1_Far Corner Sen Comm O...

5. Allocate Personnel

2

Predicting Program Costs and Revenue Allocation

FORECAST: COSTS AND REVENUE ALLOCATIONS

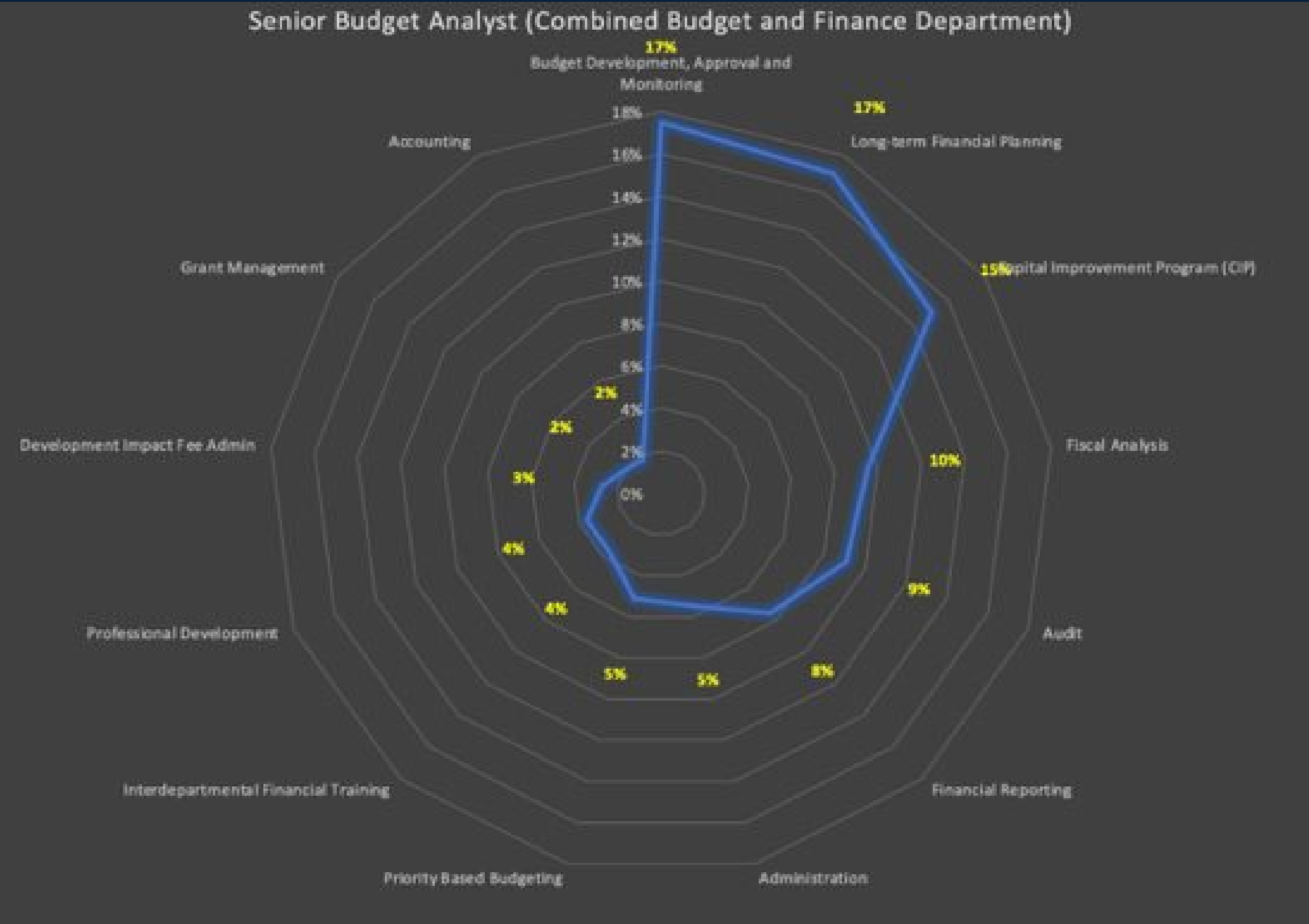


Machine learning techniques predict the costs of providing these programs and their cost-recovery.

2

Predicting Program Costs and Revenue Allocation

FORECAST: COSTS AND REVENUE ALLOCATIONS



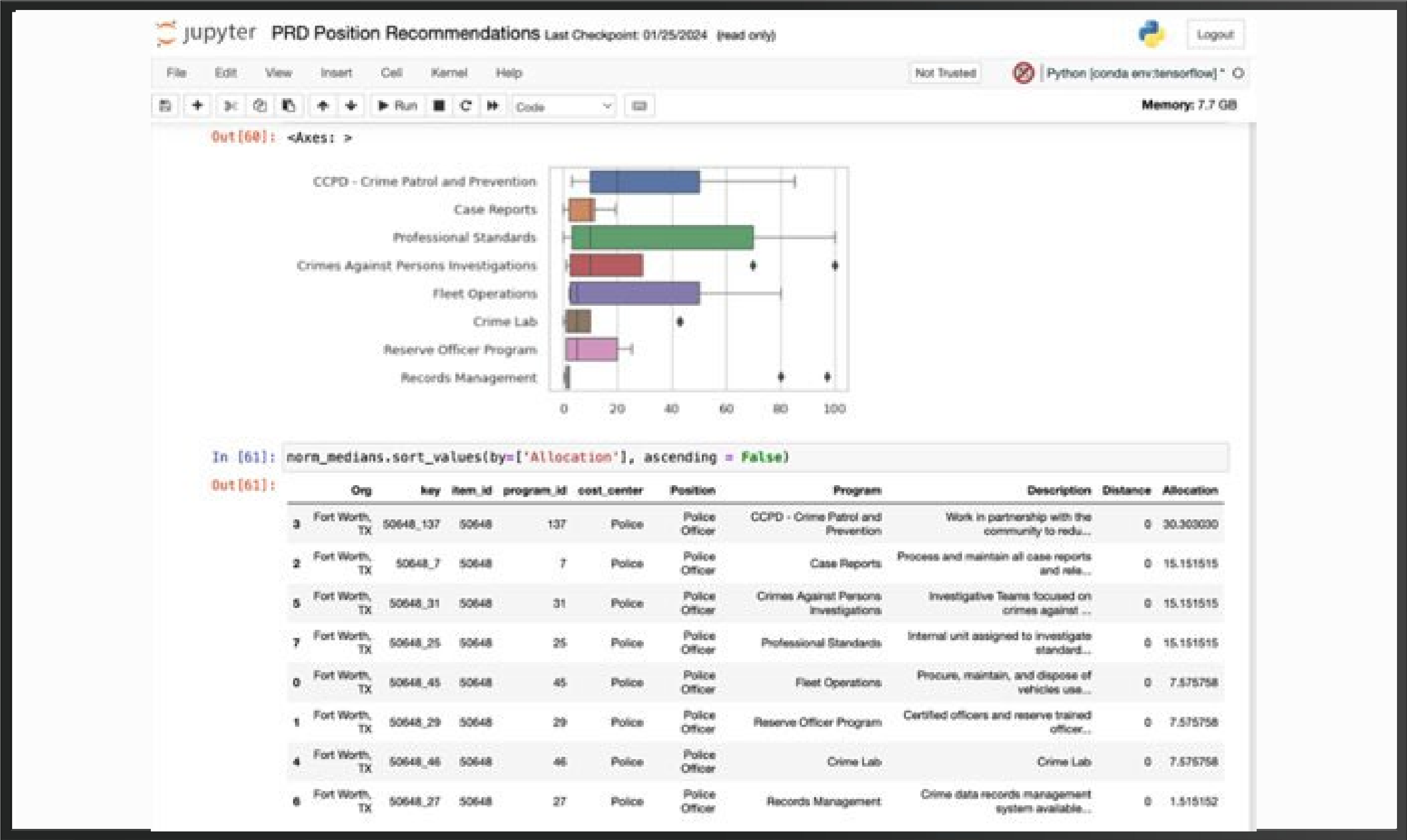
Machine learning techniques predict the costs of providing these programs and their cost-recovery.

2

Predicting Program Costs and Revenue Allocation

FORECAST: COSTS AND REVENUE ALLOCATIONS

Machine learning techniques predict the costs of providing these programs and their cost-recovery.



3

Predicting the Impact of Each Program

PREDICT: IMPACT ON ORGANIZATIONAL PRIORITIES

Configure Results

Result Types:

Community

- AFFORDABILITY & HOUSING** (AFFORDABILITY & HOUSING - Improve access to a broad range of quality housing that is safe, accessible, and affordable. Address the increase of the cost of living through diverse job opportunities, living wage adjustments, and reduce the mismatch between available jobs and skills in the workforce.)
Scale: 5-point / Edit
- MULTIMODAL TRANSPORTATION & PUBLIC TRANSIT** (MULTIMODAL TRANSPORTATION & PUBLIC TRANSIT - Building, maintaining and improving a modern infrastructure for ease of traffic flow and safety, and the availability of transportation alternatives, and access to public transportation)
Scale: 5-point / Edit
- SAFE COMMUNITY** (SAFE COMMUNITY - Meet the expected level of core and specialized public safety services as the community grows and continue to adapt and implement practices and strategies that address mental, behavioral and illegal drug health issues.)
Scale: 5-point / Edit
Weight: 3 / Edit
DEFINITIONS (The user will have to assess how well a program aligns with this collection of definitions)
 - Support the City's plan to have the Albuquerque Community Safety Department (ACSD) operate 24 hours/7 days a week.
 - Support the Animal Welfare Department to open the spay/neuter clinic to 5 days a week to reduce intakes and overcrowding at City shelters.
 - Initiate a program to hire private security entities to assist in patrolling public transit, public buildings, and neighborhoods.
 - Continue to prioritize full staffing and longevity incentives for

Governance

- HIGH PERFORMING GOVERNANCE** (HIGH PERFORMING GOVERNANCE - Delivering services desired by the community through sound financial management; data-informed, transparent, and collaborative decision making; effective communication and efficient project management; and attract and retain a City workforce through development and growth opportunities.)
Scale: 5-point / Edit

BPA

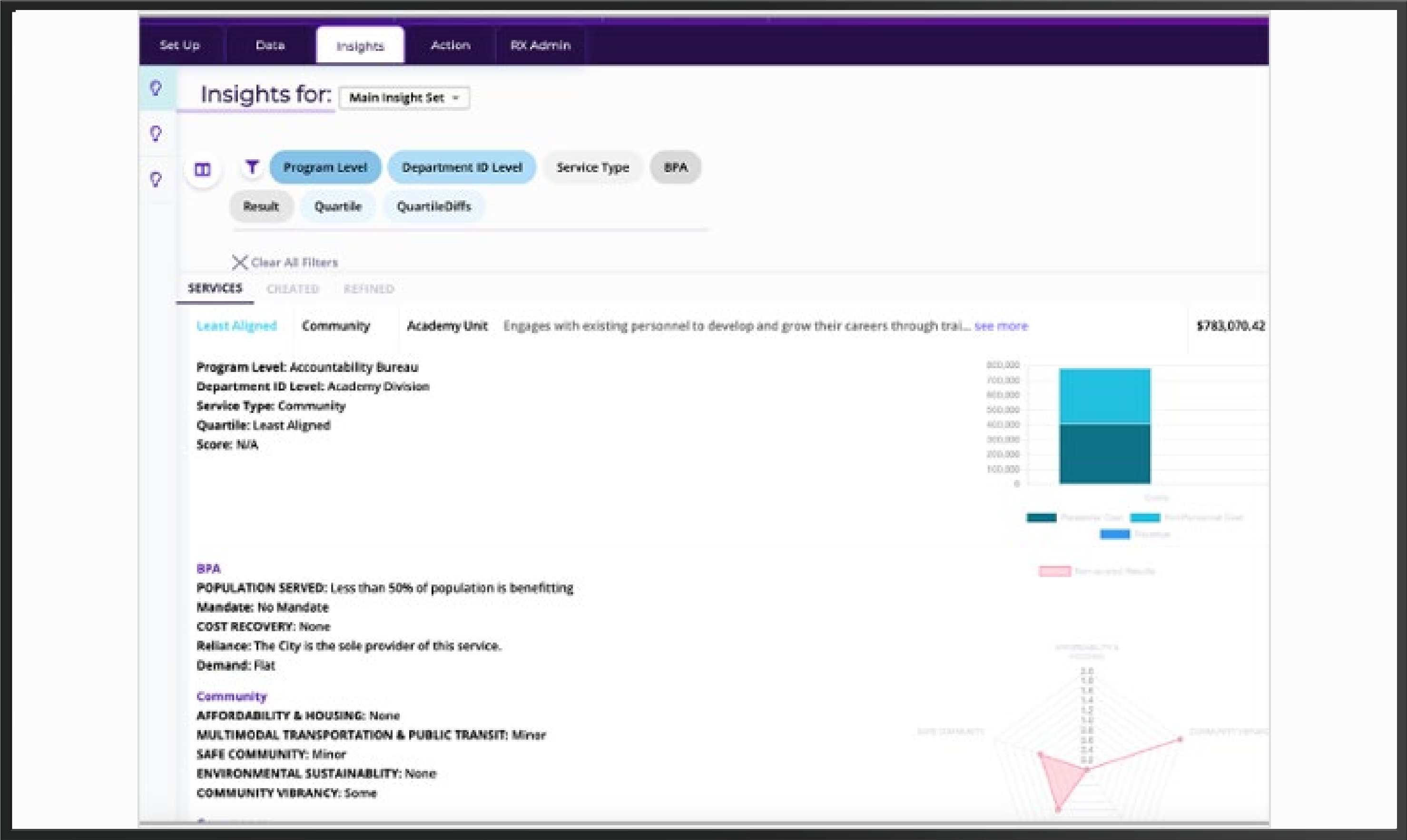
- Demand** (DEMAND)
Scale: 3-point / Edit
- POPULATION SERVED** (POPULATION SERVED)
Scale: 3-point / Edit
- Mandate** (MANDATE)
Scale: 3-point / Edit
Weight: 1 / Edit
DEFINITIONS (The user has to select the one, which best corresponds to the program)
 - ☐ No Mandate
 - ☐ Self Mandate or Ordinance
 - ☐ State or Federal Mandate
- COST RECOVERY** (COST RECOVERY)
Scale: 3-point / Edit
- Reliance** (RELIANCE)
Scale: 3-point / Edit

AI analyzes the government's strategic plan to predict how the programs will score relative to basic program attributes and the strategic plan priorities.

3

Predicting the Impact of Each Program

PREDICT: IMPACT ON ORGANIZATIONAL PRIORITIES



AI analyzes the government's strategic plan to predict how the programs will score relative to basic program attributes and the strategic plan priorities.



Resource Reallocation & Revenue Generation Opportunities

NLC

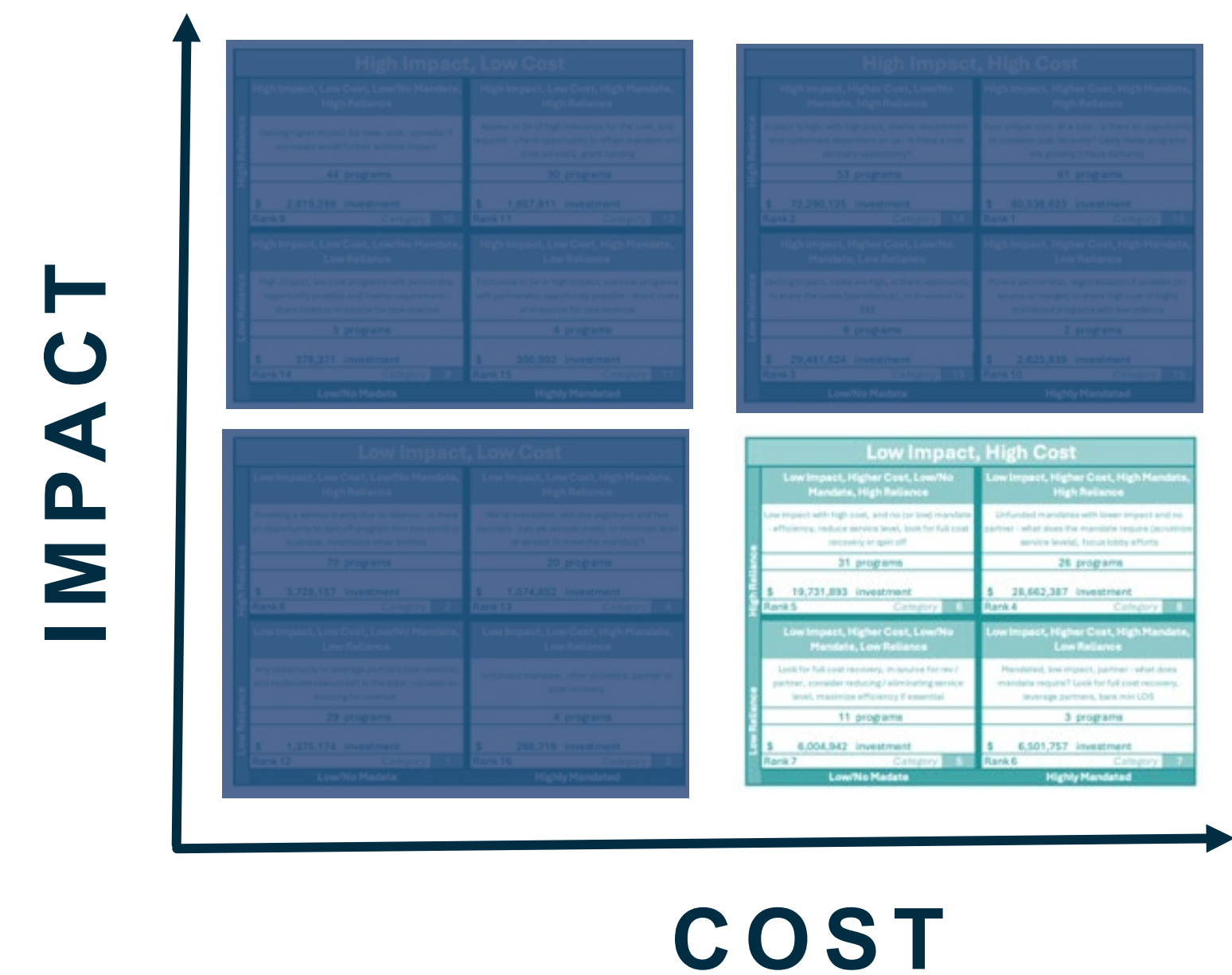
Resource Reallocation & Revenue Generation Opportunities

CASE STUDIES & EXECUTION PLANS



Resource Reallocation & Revenue Generation Opportunities

CASE STUDIES & EXECUTION PLANS



Category 5: Low Impact, High Cost, Low Mandate, Low Reliance

High-cost services with low impact and minimal mandate fall into this category, presenting a prime opportunity for cost recovery and efficiency improvements. In-sourcing for revenue generation or partnering with external entities can reduce the financial strain. Reducing or eliminating non-essential services while maximizing operational efficiency ensures that resources are utilized where they can create the most significant benefit.

1. Health Department - Health Dept Lab Program

- **Department:** Health Department
- **Program Name:** Health Dept Lab Program
- **Program Description:** Provides support to prenatal, family planning, STD, Prep (HIV prophylaxis), and TB clinics. Offers direct access to lab testing at reduced costs and in-house identification of infections for same-appointment treatment.
- **Program Cost:** \$315,990.28
- **Program Revenue:** \$0

Insights:

- **Insight 1:** Partner with local healthcare providers and hospitals to subsidize the lab services. These partners could promote their services in exchange for financial support, increasing patient referrals to their facilities.
 - **Case Study:** The City of Baltimore's health department partnered with local hospitals to subsidize lab services, reducing operational costs and improving access to healthcare for the community.
- **Insight 2:** Introduce a sliding scale fee model for lab services based on patients' income levels. This could generate revenue while ensuring affordability for low-income individuals.
 - **Case Study:** The City of Denver's public health lab implemented a sliding scale fee model, which helped offset costs and expanded access to essential lab services for underserved populations.

Opportunity: \$157,995 - \$315,990

2. Health Department - Health Dept Maternal & Child Health Fees

- **Department:** Health Department
- **Program Name:** Health Dept Maternal & Child Health Fees

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transportation services but also provides seniors with opportunities for social engagement, contributing to their overall well-being.

Opportunity: \$10,046 - \$20,093

2. Aging - Senior Citizen Lifeline Program

- **Department:** Aging
- **Program Name:** Senior Citizen Lifeline Program
- **Program Description:** Mill Levy funded medical alert for seniors
- **Program Cost:** \$6,680
- **Program Revenue:** \$0

Insights:

- **Insight 1:** Introduce a subscription-based model for the Lifeline service. Seniors or their families could pay a monthly fee for the service, which would provide a reliable source of revenue. This model could also include different subscription tiers, offering additional features such as emergency response services or health monitoring.
 - **Case Study:** Miami-Dade County introduced a subscription model for their senior alert system, which provided a steady stream of revenue while maintaining service quality. The subscription model also allowed for the inclusion of various service levels, catering to different needs and budgets.
- **Insight 2:** Partner with local businesses and health insurance companies to sponsor the Lifeline program. In exchange for their sponsorship, these entities could receive advertising opportunities, such as being featured on the Lifeline devices or in promotional materials. This would not only offset costs but also enhance the visibility and credibility of the sponsors within the senior community.
 - **Case Study:** Chicago's senior alert program partnered with local pharmacies and insurance companies for sponsorship. These partnerships provided significant financial support, allowing the program to expand its reach and improve service delivery. The sponsors benefited from increased brand recognition and positive community engagement.

Opportunity: \$3,340 - \$6,680

3. Community Programs - Downtown Shareholders Contribution

- **Department:** Community Programs
- **Program Name:** Downtown Shareholders Contribution

15



EXECUTION PLAN

Priority Based Budgeting Blueprint for Funding the Future

We Have New Needs WE WANT TO:

Launch new programs to tackle emerging challenges

Enhance current programs that need more resources

We Don't Have New Needs WE WANT TO:

Maintain/preserve current services

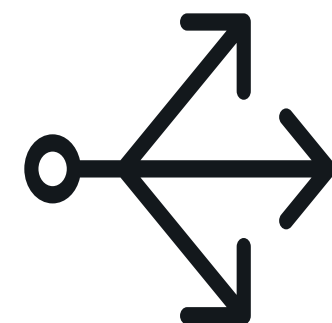
Seek to lower tax rates or refund tax-payers

HOW TO REACH THE ABOVE GOALS

FREE UP & REALLOCATE RESOURCES



SOURCING

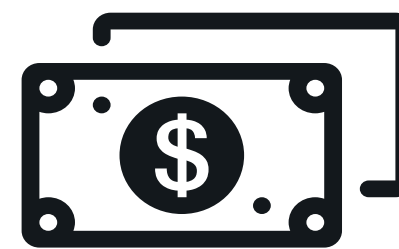


EFFICIENCIES



SERVICE
LEVELS

GENERATE NEW REVENUE



FEES &
CHARGES



GRANT
FUNDING



TAXES/RATES

4

Insights With Savings and Reallocation Recommendations DISCOVER: COST SAVINGS AND REVENUE OPPORTUNITIES

Community and Human Services Division- Mental Health and Substance Abuse Medical Services

- **Program Description:** Contract between Florida County and Center for mental health and substance abuse services, pursuant to Florida Statute, Section 394.76(9)(a) and (b).
- **Program Cost:** \$1,530,700
- **Program Revenue:** \$0

Insight 1: Pursue state and federal grants specifically targeted at mental health and substance abuse programs to offset operational costs.

- **Case Study Example:** Los Angeles County secured millions in federal grants for mental health services under the Mental Health Services Act (MHSA), reducing local funding needs.

Insight 2: Implement a sliding fee scale for services based on clients' ability to pay, ensuring those who can contribute financially do so.

- **Case Study Example:** The Mental Health Center of Denver employs a sliding fee scale for its services, ensuring cost recovery while maintaining accessibility.

Ideally, strive for: \$765,400 - \$1,530,700 in cost offset.

AI identifies patterns among similarly scored and categorized programs from other municipalities to suggest program-specific resource reallocation and revenue generation recommendations.

4

Case Studies and Guidance for Success

DISCOVER: COST SAVINGS AND REVENUE OPPORTUNITIES

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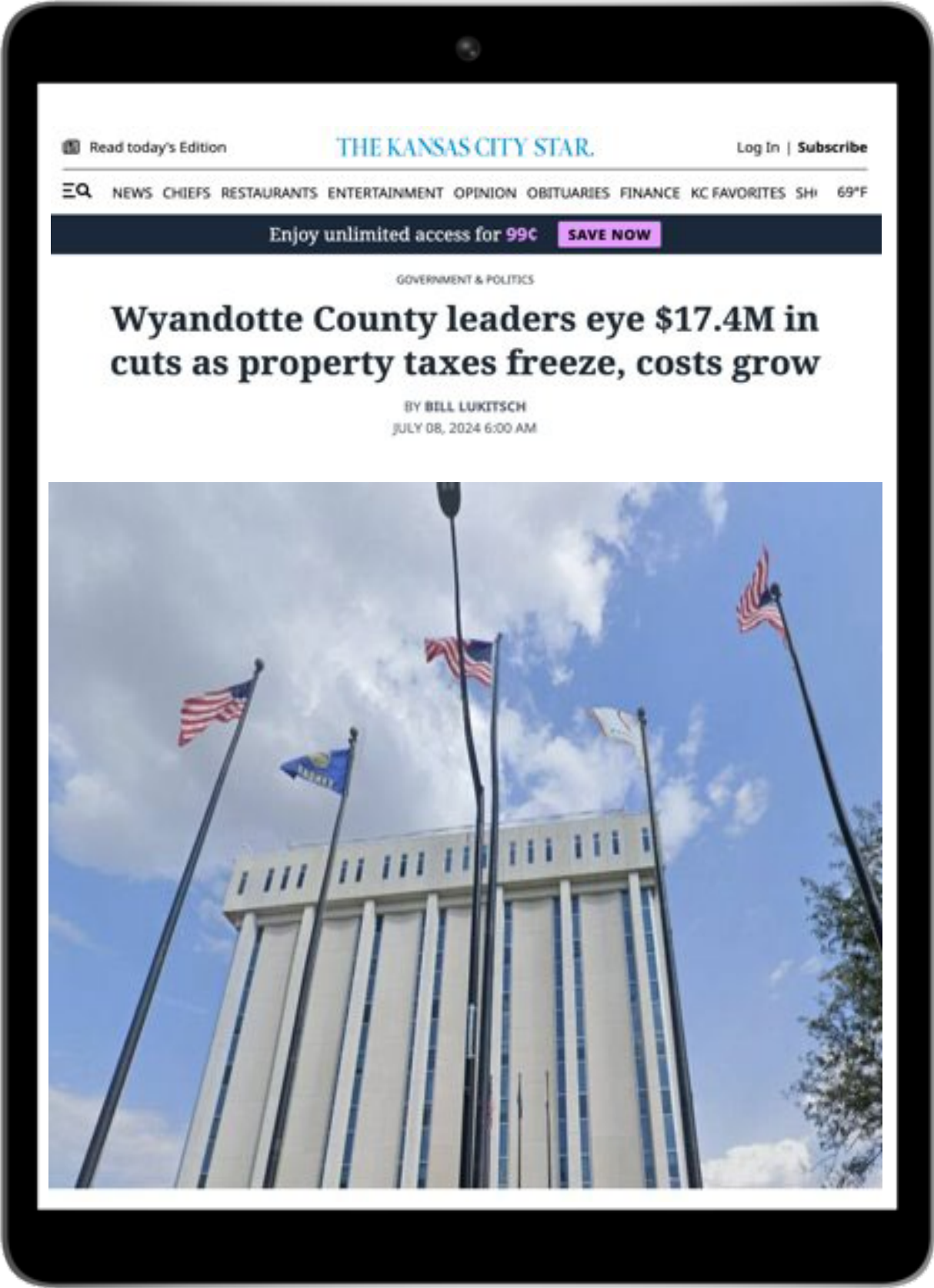
- **Case Study Example:** The Mental Health Center of Denver employs a sliding fee scale for its services, ensuring cost recovery while maintaining accessibility.

Ideally, strive for: \$765,400 - \$1,530,700 in cost offset.

AI then cites specific examples of programs that have been successful elsewhere to offer guidance as to how the current client might utilize these techniques in their own programs.

Identifying Cost Savings and Revenue Opportunities

A CASE STUDY, WYANDOTTE COUNTY, KANSAS



Category	Description	Opportunities	Potential Savings/Opportunities
1	Low Impact, Low Cost, Low Mandate, Low Reliance	Optimize low-impact services through partnerships and efficient resource reallocation.	\$0.6M to \$1.3M
2	Low Impact, Low Cost, Low Mandate, High Reliance	Spin off programs to non-profits or private businesses to maintain service levels and reduce government burden.	\$1.1M to \$1.8M
3	Low Impact, Low Cost, High Mandate, Low Reliance	Meet minimum compliance with mandates while exploring cost recovery options.	\$0.1M to \$0.2M
4	Low Impact, Low Cost, High Mandate, High Reliance	Balance mandate requirements and community expectations through cost recovery and efficiency.	\$0.5M to \$1M
5	Low Impact, High Cost, Low Mandate, Low Reliance	Focus on cost recovery and efficiency improvements through in-sourcing and partnerships.	\$3M to \$4.2M
6	Low Impact, High Cost, Low Mandate, High Reliance	Evaluate service necessity and explore partnerships to manage high costs.	\$9.8M to \$13.8M
7	Low Impact, High Cost, High Mandate, Low Reliance	Efficiently meet mandate requirements through strategic adjustments and partnerships.	\$3.2M to \$3.9M
8	Low Impact, High Cost, High Mandate, High Reliance	Manage high-cost mandated services through cost recovery and efficiency improvements.	\$14.3M to \$17.1M
9	High Impact, Low Cost, Low Mandate, Low Reliance	Enhance significant impact programs at low cost through targeted investments and partnerships.	\$0M to \$0.1M
10	High Impact, Low Cost, Low Mandate, High Reliance	Increase the effectiveness of high-impact, low-cost programs through partnerships and additional funding.	\$0.5M to \$1.1M
11	High Impact, Low Cost, High Mandate, Low Reliance	Maximize community impact while ensuring compliance with mandates.	\$0M to \$0.1M
12	High Impact, Low Cost, High Mandate, High Reliance	Maintain and enhance critical high-impact, low-cost services to meet community needs and mandate requirements.	\$0.3M to \$0.7M
13	High Impact, High Cost, Low Mandate, Low Reliance	Manage high-cost impactful services through cost-sharing partnerships and cost recovery mechanisms.	\$2.9M to \$4.4M
14	High Impact, High Cost, Low Mandate, High Reliance	Focus on cost management and sustainability for high-cost, high-impact services with high community reliance.	\$3.6M to \$7.2M
15	High Impact, High Cost, High Mandate, Low Reliance	Strategically manage high-cost mandated services through partnerships and cost-saving opportunities.	\$0.1M to \$0.2M
16	High Impact, High Cost, High Mandate, High Reliance	Ensure the sustainability of critical high-cost, high-impact services through cost recovery, efficiency improvements, and strategic investments.	\$4M to \$8M

The sum total of the potential savings ranges from \$44.7M to \$65.8M

The initial, potential savings for the County range from approximately **\$44.7 million to \$65.8 million**. The breakdown of opportunities across various categories provides a clear pathway to achieving these savings through a combination of partnerships, cost recovery, and strategic adjustments.

The Budget Process with Priority Based Budgeting

A CASE STUDY:
A CITY IN ARIZONA



The Budget Process with Priority Based Budgeting

A CASE STUDY: A CITY IN ARIZONA



05-Community Development

Below is a summary of programs and their total requested amount and potential new total cost.

Quartile	Program	Total Cost	Requested Amount	Proposed Total Cost
4	CD Personnel	\$23,591	\$4,000	\$27,591
2	Inspections	\$1,488,475	\$200	\$1,488,675
1	Planning Discretionary Review	\$231,757	\$512	\$232,268
2	Code Compliance	\$376,883	\$1,252	\$378,135
1	Regional Plan Update and Management	\$112,080	\$202,716	\$314,796
2	Neighborhood & Specific Plans	\$137,007	\$512	\$137,519
1	Zoning and Subdivision Code Management	\$126,370	\$810	\$127,179
2	Affordable Housing Unit Creation	\$177,282	\$110,000	\$287,282
1	Community Development Block Grant Management	\$1,407,201	\$325,000	\$1,732,201
4	Intra-divisional Engineering Assistance and Support	\$39,288	\$35,000	\$74,288
1	Traffic Systems Management	\$224,176	\$73,900	\$298,076
3	Direct Rental Assistance	\$4,863,450	\$1,636,550	\$6,500,000
2	Engineering Plan/Permit Review	\$405,868	\$22,000	\$427,868
2	Section 8 Client Management	\$145,443	\$50,750	\$196,193
1	Public Housing: Residential Property Maintenance	\$1,732,136	\$20,500	\$1,752,636
2	Housing Community Information and Referrals	\$39,806	\$10,000	\$49,806
2	Plan / Permit / Project Review	\$1,058,857	\$1,250	\$1,060,107
Total		\$12,589,669	\$2,494,960	\$15,084,619

Below is a detailed outline of the impact every request has on program listed above.

Program and Request Description	Requested Total	Decision Status
CD Personnel		
Certified Public Manager	\$4,000	Approved
Inspections		
Inspection supplies and equipment	\$200	Approved
Planning Discretionary Review		
Additional Regional Plan Advertising	\$512	Approved
Code Compliance		
Additional Regional Plan Advertising	\$1,252	Approved
Regional Plan Update and Management		
Software to support Scenario Planning and Hybrid Public Engagement	\$0	Approved
Additional Printing Costs for the Regional Plan Update	\$1,800	Approved
Writer/editor for the Regional Plan Update	\$20,000	Approved

Regional Plan Update and Management

Program Description

An update to the Regional Plan is required every 10 ten years which must be sent to the voters for ratification. The Regional Plan is the General Plan for the City. The General Plan is a comprehensive long-range plan for the development of the City and includes statement of community goals and policies, maps, concept plans, and strategies. It covers a wide variety of topics including housing, business, recreation, open space, natural resources, and public facilities. Once a plan is approved annual reports are prepared on the statistical data that supports the Regional Plan. Prepare, process and coordinate amendments to the Regional Plan.

Program Budget

	Total Cost	Requested Amount	Proposed Total Cost
Personnel	\$98,274	\$0	\$98,274
NonPersonnel	\$13,806	\$1,800	\$15,606
Revenue	\$0	\$0	\$0
Total	\$112,080	\$1,800	\$113,880

Budget Request Description

Additional Printing Costs for the Regional Plan Update

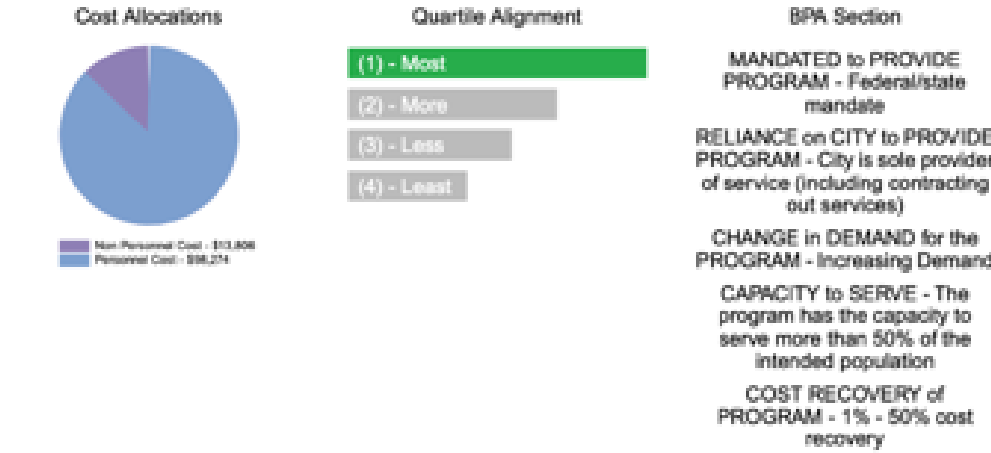
Box Choices

How does this request impact the program service level?:
Maintains service level

Is this request Recurring or One-time? (select one):
One-time

Is this a new funding request or a base budget reallocation request?:
New Funding Request

Priority Based Budgeting Analysis





Insights

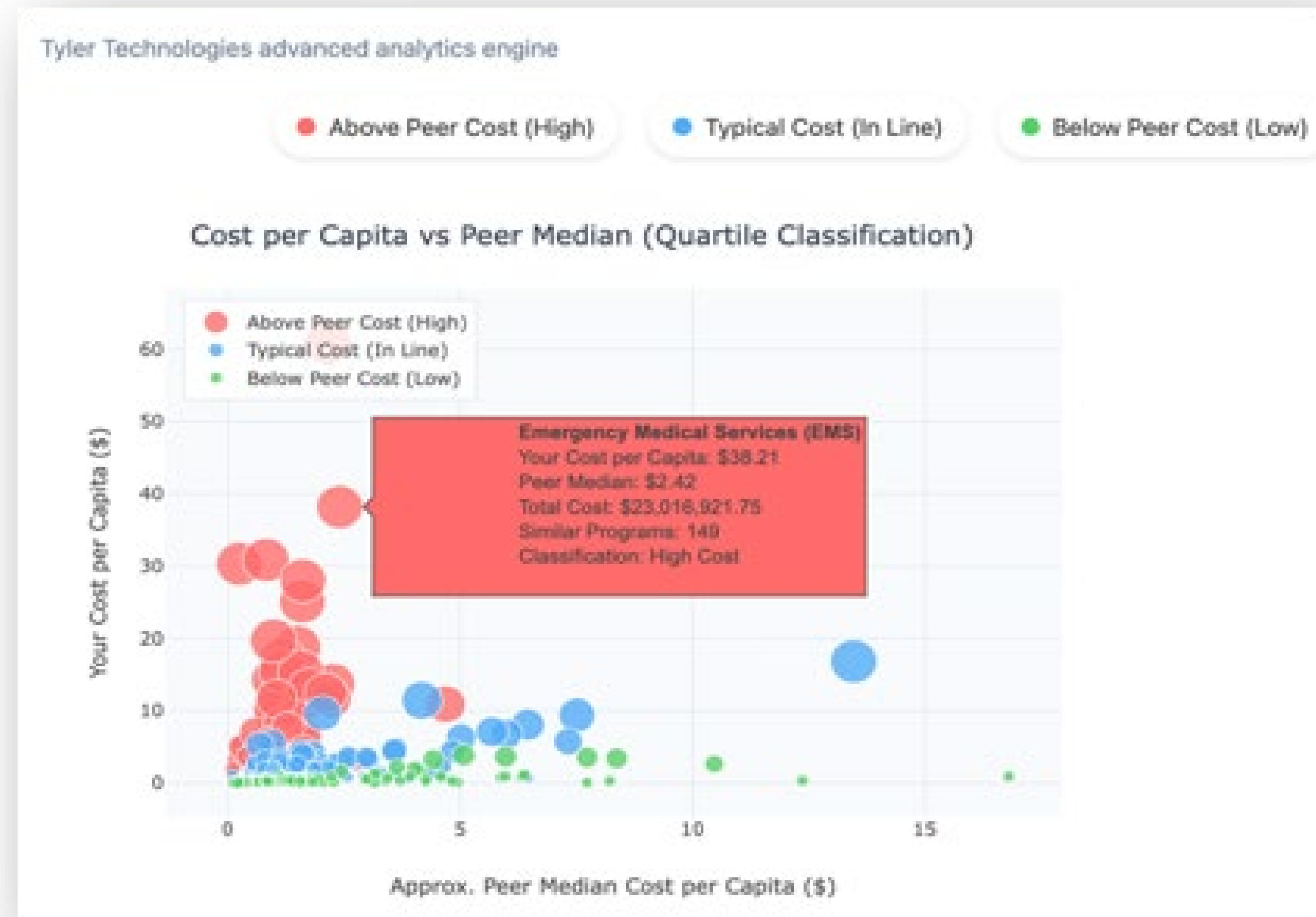
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Insights to Apply Program Analytics

- **Program Benchmarking Analytics:** Find which costs are truly high — and which are right where they should be.
- **Program Insights Predictor:** Surface proven solutions other governments used to balance their budgets. Transform insights into actionable, ready-to-execute plans.
- **Process Analyzer:** Identify duplication, centralize processes, and redeploy savings where they matter most.

Program Cost Benchmarking

- **See where you stand, relative to peers**
- **Consider service levels without services**
- **Replace assumptions with evidence**



Program Process Overlap Analysis

- **Review for duplication across departments**
- **Consider centralization and (internal) partnerships**
- **Build structural sustainability**

Processes for Appraisal Management

Valuation Assessment (Inspections)

Conducting evaluations of property values to ensure accurate taxation.

Taxation Coordination (Enforcement)

Coordinating with taxation authorities to align property valuations with tax requirements.

Litigation Support (Records Management)

Providing support and documentation for legal proceedings related to property valuation disputes.

Stakeholder Collaboration (Public Engagement)

Working with TTV and LGL to ensure compliance and address any valuation or taxation issues.

Data Management and Reporting (Data Collection and Reporting)

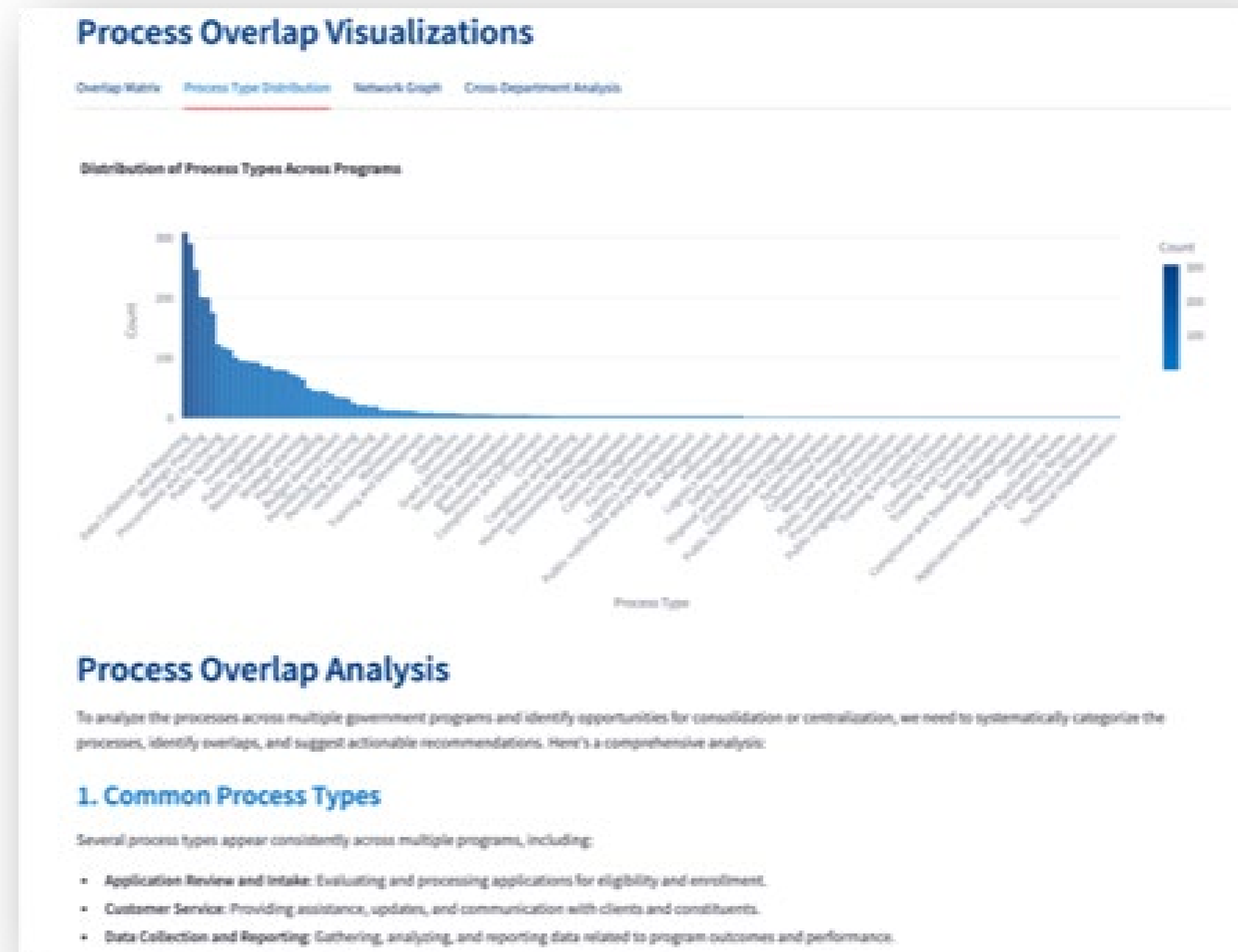
Collecting and reporting data related to property valuations and taxation for internal and external stakeholders.

Operational Oversight (Performance Management)

Managing the daily operations of the appraisal department to ensure efficiency and compliance.

Program Process Overlap Analysis

- Review for duplication across departments
- Consider centralization and (internal) partnerships
- Build structural sustainability



Insight Implementation Plans

- Transform insights into executable action
- Accelerate adoption, reduce risk
- Close deficits through follow-through

DEPARTMENT OF HEALTH AND ENVIRONMENT: Air Quality Inspections - Regulatory inspections of Air Regulated facilities to comply with clean air act

Revenue-Generating

Case Study: City of Houston, TX

What They Actually Did

The City of Houston launched a public-private partnership for air quality monitoring, allowing local businesses to sponsor monitoring equipment. Sponsorship fees were used to support regulatory inspection costs and expand monitoring capacity.

How They Implemented It

Limited implementation details available in case study

Your Replication Steps

1. Identify potential sponsors in Johnson County, such as local industries and environmental groups, 2. Develop sponsorship packages that include recognition benefits for sponsors, 3. Use sponsorship revenue to offset costs associated with air quality inspections and equipment, 4. Establish partnerships with local businesses to sponsor air quality monitoring equipment, 5. Implement a system to recognize sponsors publicly, enhancing their community profile, 6. Monitor and evaluate the program's financial and environmental impact regularly.

Implementation Timeline

Phase 1: 3-6 months to identify sponsors and develop sponsorship packages. Phase 2: 6-12 months to secure sponsorships and implement monitoring equipment. Phase 3: Ongoing monitoring and evaluation.

Success Metrics

Amount of sponsorship revenue generated annually, Number of air quality monitoring units deployed, Reduction in air quality violations or improvements in air quality metrics, Number of sponsors participating in the program.

Potential Challenges

Potential challenges include securing sufficient sponsorships, ensuring accurate and reliable air quality data, and maintaining public trust in the program's integrity.

Resources Needed

Resources needed include staff time for sponsor outreach and package development, monitoring equipment, and administrative support for managing sponsorships.

Target Budget Calculator

- Translate priorities into dollar targets
- End across-the-board cuts
- Balance budgets with transparency and trust

The screenshot displays the 'Target Budget Calculator' interface. At the top, under 'Configuration', there is a dropdown for 'Accounting Fund' set to 'GENERAL FUND', a text input for 'Overall Budget Change (%)' set to '0', and a checkbox for 'Protect Revenue-Generating Programs' which is checked. Below this, 'Quartile Budget Changes (%)' are specified: 1st Quartile (empty), 2nd Quartile (2), 3rd Quartile (-2), and 4th Quartile (-5). A green button labeled 'Calculate Target Budgets' is prominent. Below the button, there are 'Save Progress' and 'Export to PDF' buttons. The main results section, titled 'Results (GENERAL FUND)', shows three key figures: 'Original Budget' at \$1,268,102,160, 'Target Budget' at \$1,263,444,392, and 'Total Change' at -\$4,657,768 (-0.37%). At the bottom, a table provides a breakdown by quartile.

Quartile	Programs	Original	Target	Change	Change (%)
1st Quartile	83	\$140,635,904	\$147,667,699	\$7,031,795	(5.00%)
2nd Quartile	163	\$406,933,972	\$415,072,651	\$8,138,679	(2.00%)
3rd Quartile	156	\$539,945,712	\$529,146,798	-\$10,798,914	(-2.00%)
4th Quartile	97	\$180,586,572	\$171,557,243	-\$9,029,329	(-5.00%)



On the Horizon

NLC

Chris Fabian PBB

Thank you for your question about the PBB preferred policy guidance for all programs in the Aging and Human Services department. I'll provide a comprehensive analysis using the data available.

EXECUTIVE SUMMARY:

The Aging and Human Services department has 11 identified programs spanning categories 1, 2, 5, 6, and 10. The department's portfolio is mixed, with a slight lean towards lower impact programs. Key recommendations include:

1. Optimize low-impact programs through partnerships and efficiency measures
2. Protect and invest in high-impact, high-reliance programs
3. Explore cost recovery options for high-cost programs
4. Develop a strategic plan to shift the portfolio towards higher impact over time

DETAILED ANALYSIS:

SECTION: DEPARTMENT OVERVIEW - AGING AND HUMAN SERVICES

SECTION: STATISTICAL ANALYSIS

Average Category: 3.45

Mode Category: 1

Distribution:

- Category 1: 5 programs (45.5%)
- Category 2: 1 program (9.1%)
- Category 5: 3 programs (27.3%)
- Category 6: 1 program (9.1%)
- Category 10: 1 program (9.1%)

A Priority Based Budgeting Chatbot

Your On-Demand Fiscal Strategist

- Access on-demand analysis
- Quantify savings before a budget crisis hits
- Turn data into confident decisions



How is it complemented within Tyler?

NLC



Tyler's Priority Based Budgeting

A SaaS Solution with Managed Services

Tyler's Priority Based Budgeting is a cloud-native software solution coupled with managed services that enable an organization to create a priority-based budget.

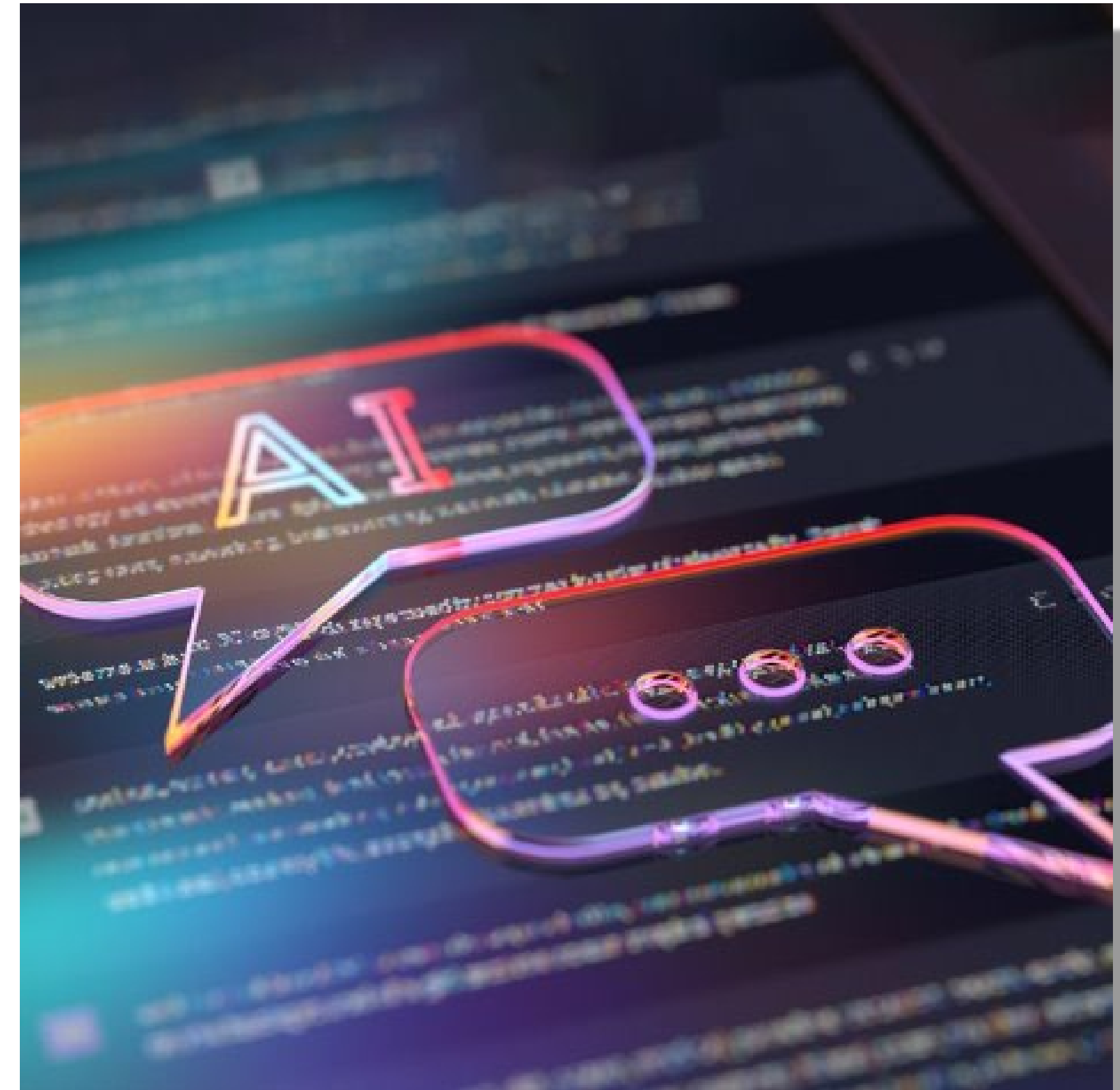
A Standalone Software Solution

It is offered as a standalone solution to enhance any ERP, budget development application, or process.

AI & Machine Learning Technology

Artificial intelligence (AI) and machine learning (ML) facilitate rapidly creating program and priority-based budgets and resource optimization recommendations.

A typical project takes 3-5 months.





Technology Transformation Management

Priority Based Budgeting Director *(supplemental offering)*

The embedded Priority Based Budgeting Director directly engages with key decision-makers and departmental staff as they evaluate their budgets using the Priority Based Budget lens.

Intuitive with minimal skills required

It assists with organizational change management, technology integration, and workforce capacity constraints.



Priority Based Budgeting Redefines the Finance Function

Our AI-powered **Priority Based Budgeting platform and framework** enables governments and school districts to easily and quickly uncover budget savings, identify revenue possibilities, better allocate funds, and create sustainable, fiscally responsible budgets.



To Learn More About Priority Based Budgeting:

Jesse Muniz

Jesse.Muniz@tylertech.com



»» Thank You ‹‹