GFOA Award Application

Local Significance and Value

1. Please give a brief general description of the project or program being submitted.

Palo Alto Open Budget enables citizens and staff to easily access, visualize, and share city financial data including the budget, past years’ actual spending, employee headcount, salaries and benefits, and detailed transaction data. The application uses cutting edge web technology to facilitate faster internal reporting and more flexible, interactive, and detailed external reporting for unprecedented public accountability. Within a few clicks of a button, any stakeholder can drill into detailed historical expenses or revenues and control funds, programs, and ledger items to view.

2. Describe the local events and/or problems that led to the undertaking of this project/program.

Our internal reporting process was laborious and time-consuming for analysts. Creating charts, graphs, and data extracts for meetings and city council took many hours of valuable staff time. In addition, our citizens are highly engaged and want detailed access to core financial information. Thus, we partnered with a local start-up to develop a financial transparency tool that would make our daily workflow easier and give citizens a new way to understand the city’s finances.

3. Describe the role the finance office/finance officer played in this project/program.

The financial officer initiated and oversaw this project to guarantee data accuracy and presentation. Under his direction, the finance office worked with the previously mentioned start-up to process data, give feedback on product design, and shape the vision for how to present this information internally and externally.

4. How much time did each participant devote to this program/project? Were outside consultants engaged?

Over 200 hours of staff time. We worked with a local start-up called Delphi Solutions that completed the software engineering to develop the application. We advised heavily and helped them work through initial data issues, and they spent many hours building the technology.

Technical Significance

What financial concepts, standards, or techniques are displayed or advanced by this entry? Why is this important to the public finance profession?

This entry displays budget, accounting, purchasing, and payroll data in an easily accessible interface. It makes it simple for both staff and citizens to quickly get an
understanding of our city’s financial data. This is an important step in improving the workflow of public finance professionals to create reports and for how public finance professionals display and communicate information to the public. Now, it will be far easier and quicker to explain to citizens how resources are allocated and to prompt more informed questions from the public.

**Transferability**

How can this project/program be adapted for use by other organizations? Who else might benefit by its adoption? Would significant modifications be required for implementation?

This application can easily be implemented by other organizations with minimal modification.

**Cost/Benefit**

Quantify the total resources (money and time) devoted to this project/program and identify the value added (tangible and/or intangible) as a result of undertaking it.

We hope to accrue a variety of intangible benefits through public transparency: citizen trust, civic engagement, public application development, positive suggestions for efficiency, and time or cost-savings.

**Complexity**

Describe the complexity of the project/program. How much training and technical skill is required for employees to make use of this solution?

The application has been developed with top designers to be extremely user-friendly. Training can be completed in less than 10 minutes, using the application’s ‘how-to guide’. From a technical perspective, the data upload process is a simple Excel upload of a standard extract from the financial system. Much of the complex work is hidden away from the user so that it is easy to on-board the application and get started quickly.

**Originality, Creativity, and Innovation**

To your knowledge, is this the first time this type of project/program has been implemented by a government entity?

Yes, this is the cutting edge of web-based data visualization applied to municipal finances. Obviously, there are other open data efforts, but none with this sort of ease-of-use and high quality/fast data visualization.