



# Budget Narrative Database (BUN-D)

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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’

**CITYlink** NEWS CITY EMPLOYEE TOOLBOX APPS

Search Citylink...

**Saluting veterans of the Vietnam War**  
 Scottsdale's annual Veterans Day event highlights the commemoration of the 50th anniversary of the Vietnam War. The city has been designated a Vietnam War Commemorative Partner and as such, we are thanking and honoring Vietnam veterans and their families, including those related to employees. [More »](#)

**'Tis the Season for Holiday Lights!**  
 McCormick-Stillman Railroad Park's Holiday Lights event kicks off Friday, Nov. 30. Although you must wait until the end of the month to experience the one-of-a-kind Holiday Lights train ride, you don't have to wait to purchase tickets or fast passes.

**FISH! Catch the Energy, Release the Potential**  
 The FISH! Philosophy is a set of simple, practical tools to help you create the work culture you've been looking for. Training takes place from 9 to 11:30 a.m. Tuesday, Nov. 13, in the North Corp Yard Wrangler Room.

**2018 Employee Awards nominations - read all about it!**  
 More than 370 employees were nominated in various categories for a 2018 Scottsdale Employee Award. Were you one of this year's nominees or would you like to read some of the nominations?

**Giving back - priceless**  
 Budget Director Judy Doyle contacted Operation Fix It last month with the desire to get involved and give back, but she wanted the assistance to be a collective effort. With that in mind, the Budget team provided some much-needed help to longtime resident, Felicia.

« Prev | 1 | 2 | 3 | Next »

[All Cityline Headlines...](#)

SCOTTSDALEAZ.GOV  
 WEBTIME  
 EMPLOYEE SELF SERVICE  
 SCOTTSDALE EZ  
 SCOTTSDALE UNIVERSITY  
 EMPLOYEE PERFORMANCE MANAGEMENT

ESSENTIAL LINKS MY LINKS

Classifieds  
 Administrative Regulations  
 HR Benefits  
 Risk Management / Safety / Take Pride!  
 Staff Directory  
 Budget ←  
 City Council Agendas & Minutes

**CITYlink** NEWS CITY EMPLOYEE TOOLBOX APPS Search Citylink...

> Home Page > Toolbox > Budget

**BUDGET**

The Budget Department maintains the city's fiscal controls including: preparation of monthly and annual financial reports; Capital Improvement Plan coordination; preparation of the city's budget and five-year financial plan; preparing multi fund short-range and long-range revenue and expenditure forecasts; calculating indirect cost rate; coordinating Rate & Fee adjustments; and analyzing and researching economic trends.

**FY 2020/21 Budget Development**

**CAPITAL IMPROVEMENT PLAN**  
 CIP Kick Off Presentation  
 CIP Important Dates

**OPERATING**  
 Operating Important Dates  
 Kick-Off Important Dates (video)  
 New for FY 2020/21 (video)  
 Reminders (video)

**Budget Updates**

**Weekly**  
 Dec 9-13  
 Dec 2-6  
 Nov 18-22  
 Nov 11-15  
 Nov 4-8

**Videos**  
 Meet the Team (video)

**Budget Books** Archived Budgets

**BUDGET OFFICE**  
 Staff Contacts

**BUDGET LINKS**  
 Budget Applications - **Training**  
 Budget Applications ←  
 Budget Financial Reports  
 Budget Liaison Reports  
 Monthly Financial Reports

**BUDGET GUIDES / MANUALS**  
 Operating Budget Guide  
 CIP Budget Guide  
 System Administration - Operating  
 System Administration - CIP  
 Budget Transfers  
 Expense  
 Revenue/Debt  
 Transfers In/Out  
 Packages  
 Labor (Prism - Salary Forecasting)  
 Division Narrative  
 Capital - Planning

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

**COS BDMS**

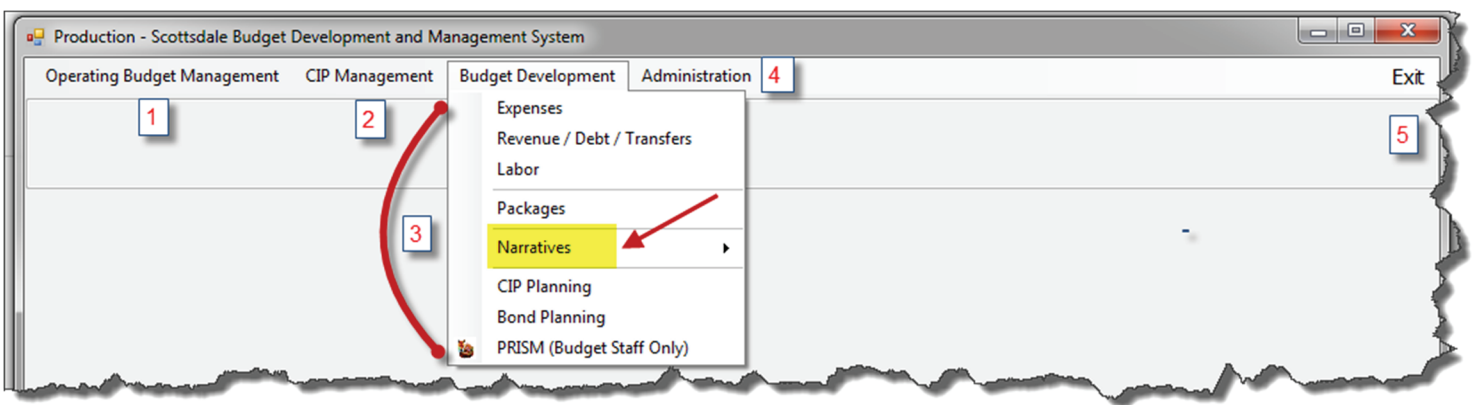
**Name:** COS BDMS

**Version:** 2.1.0.119

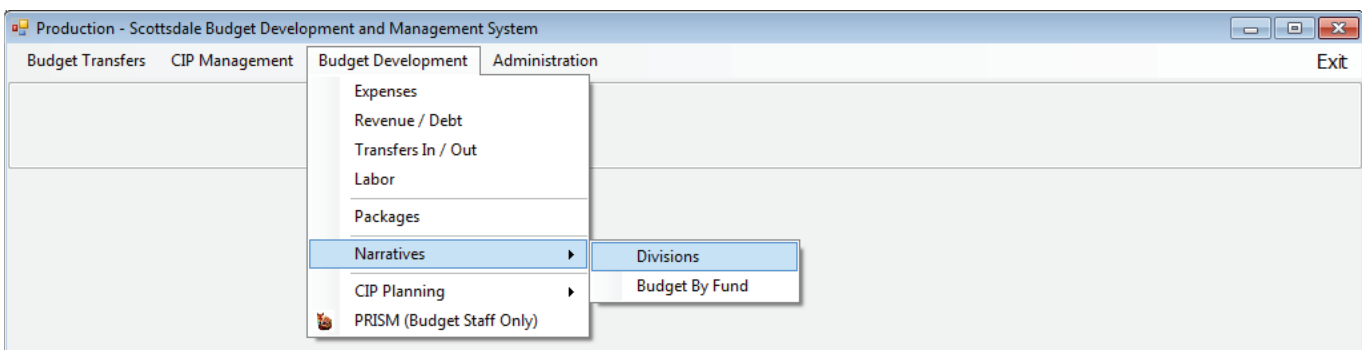
**Publisher:**

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

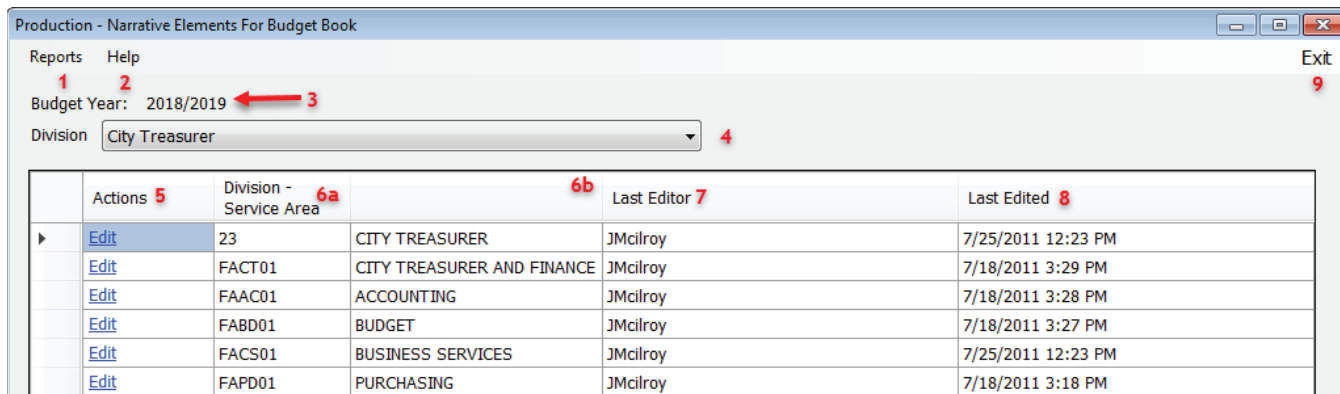


Two options will appear. The first option titled 'Divisions' is where liaisons will enter their division summary information and all pertinent data in BUN-D (**B**udget **N**arrative **D**atabase). The second option titled 'Budget By Fund' includes a five-year historical summary for revenues and expenditures that will be completed by the budget office. Select the first option 'Divisions' to begin your data entry.



## DIVISIONS

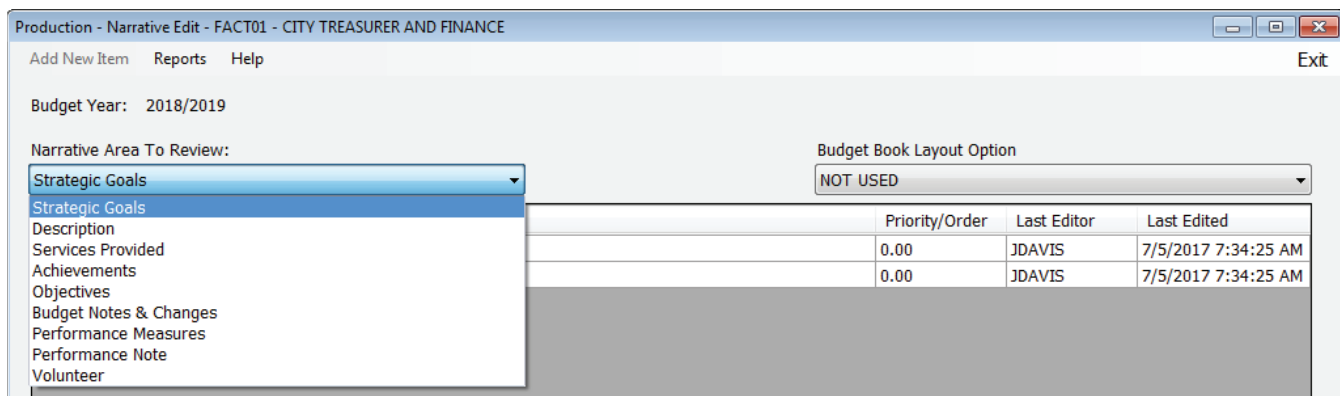
The 'Divisions' option takes you to the screen below:



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:

Budget Year: 2015/2016

Narrative Area To Review: **Strategic Goals**

Budget Book Layout Option: Option 1 - 3 Page (Default)

Actions	Narrative Item	Priority/Order	Last Editor	Last Edited
<a href="#">Edit</a>	Preserve Meaningful Open Space	0.00	JJEN	2/12/2015 3:07:58 PM
<a href="#">Edit</a>	Seek Sustainability	0.00	JJEN	2/12/2015 3:07:58 PM
<a href="#">Edit</a>	Enhance Neighborhoods	0.00	JJEN	2/12/2015 3:07:58 PM
<a href="#">Edit</a>	Value Scottsdale Unique Lifestyle and Character	0.00	JJEN	2/12/2015 3:07:58 PM
<a href="#">Edit</a>	Advance Transportation	0.00	JJEN	2/12/2015 3:07:58 PM
<a href="#">Edit</a>	Support Economic Vitality	0.00	JJEN	2/12/2015 3:07:58 PM

The default screen that will appear will be 'Strategic Goals'. However by clicking on the drop down arrow, under 'Narrative Area to Review', select the narrative area to be updated

### 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 definition and/or an example of what is being requested.

Production - Narrative Edit - FABD01 - BUDGET 1

Add New Item Reports Help Exit

Budget Year: 2018/2019

Narrative Area To Review: **Strategic Goals**

Budget Book Layout Option 9: NOT USED

Actions 4	Narrative Item 5	6 Priority/Order 7	Last Editor 8	Last Edited
<a href="#">Edit</a>	Support Economic Vitality	0.00	RFIELDER	2/26/2016 10:20:57 AM
<a href="#">Edit</a>	Seek Sustainability	0.00	RFIELDER	2/26/2016 10:20:57 AM

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.

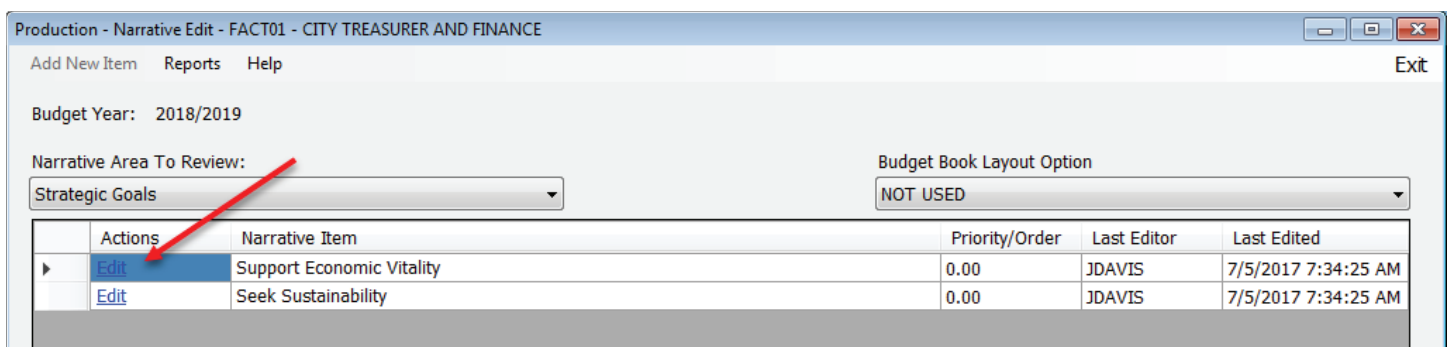
To begin your updates click on 'Edit' located in the 'Actions' column (as shown on the previous page).

## 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.



Actions	Narrative Item	Priority/Order	Last Editor	Last Edited
<a href="#">Edit</a>	Support Economic Vitality	0.00	JDAVIS	7/5/2017 7:34:25 AM
<a href="#">Edit</a>	Seek Sustainability	0.00	JDAVIS	7/5/2017 7:34:25 AM



Production - Strategic Goals - FAAC01

More Actions Reports Help

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.

Production - Strategic Goals - FACT01

More Actions Reports Help

Budget Year: 2020/2021

2 Strategic Goals Instructions

Advance Transportation

Enhance Neighborhoods

Preserve Meaningful Open Space

Seek Sustainability

Support Economic Vitality

Value Scottsdale's Unique Lifestyle and Character

3 Priority / Order 0.00

4  Include with Division

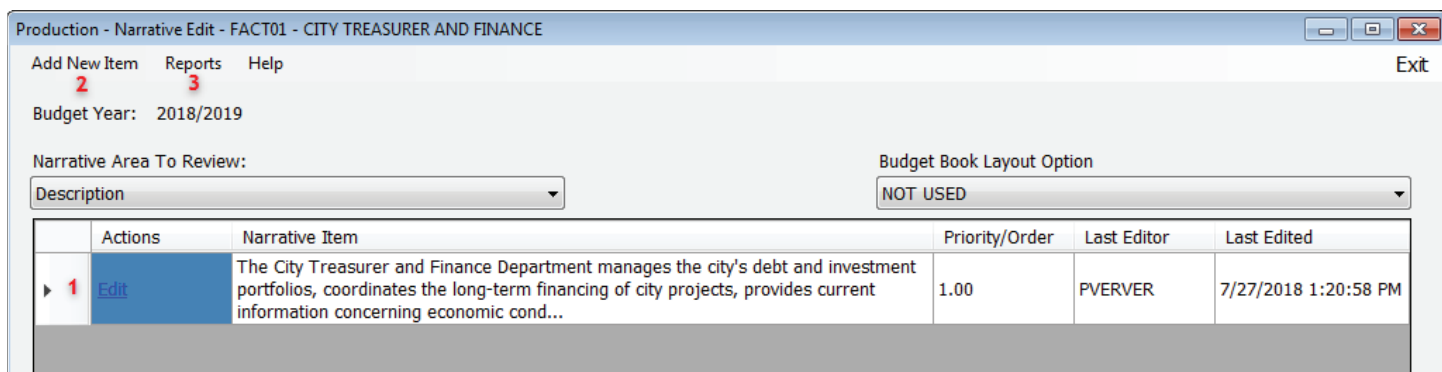
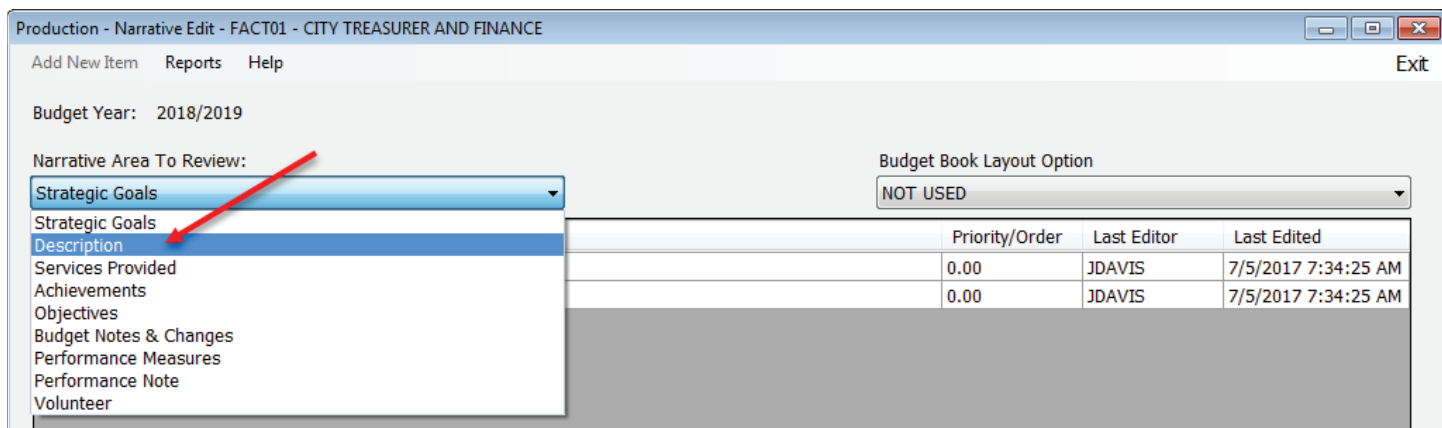
5 Save

Last Edited by JDAVIS at 7/5/2017 7:34 AM 7

- 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

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

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.

**3** Priority / Order  
1.00

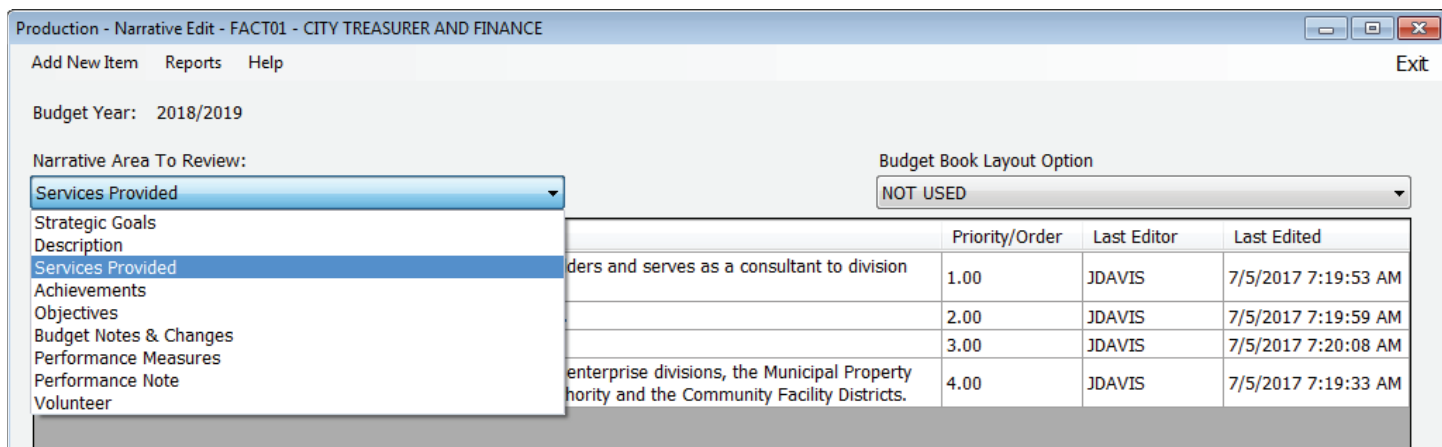
**4** Save

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

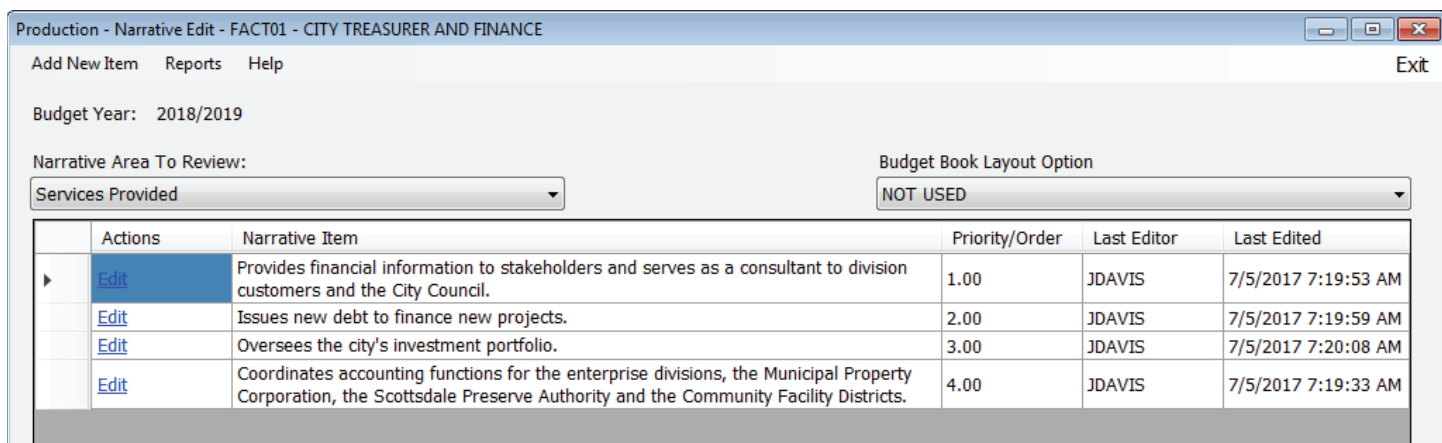
(2) The tab titled 'Description' will be where you will edit/add your data. The Description field will have a spell check feature. (3) The 'Priority/Order' is the order the information will appear in the Budget Book. (4) After you make any changes select save (Bottom right hand corner of the screen).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

**Services Provided**

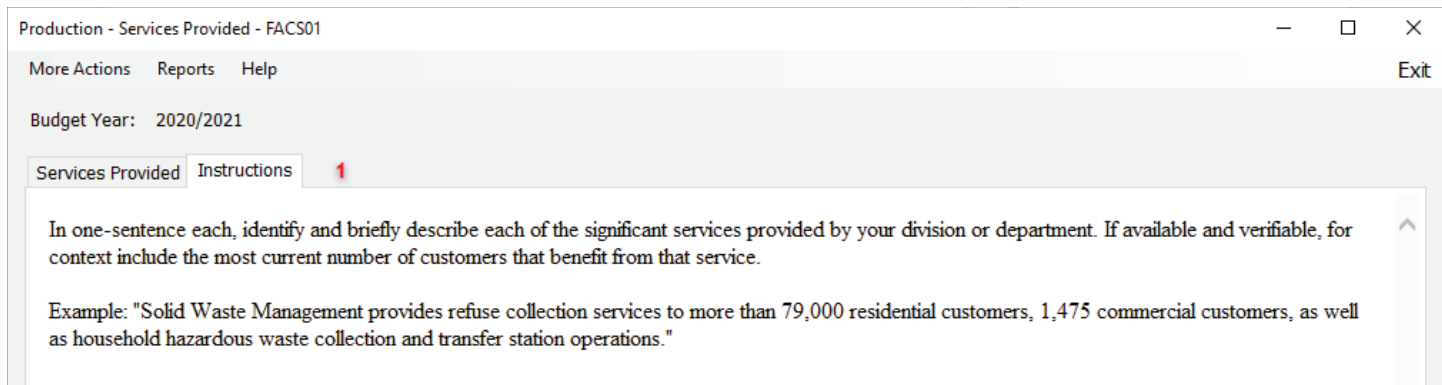
In one-sentence, identify and briefly describe each of the significant services provided by your division or department. If available and verifiable, please include the most current number of customers that benefit from that service.



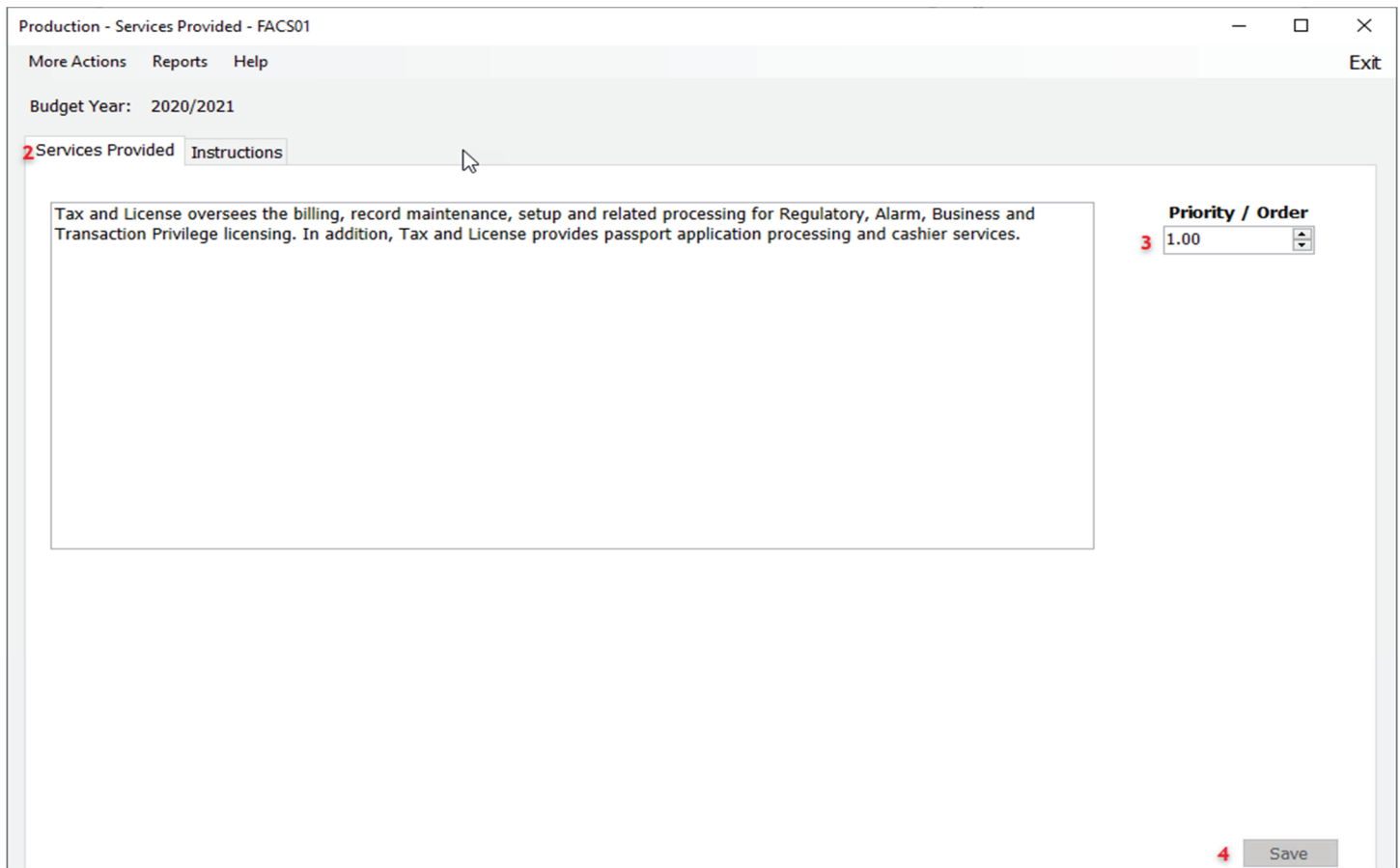
Click on 'Services Provided' from the drop down box from the 'Narrative Area to Review':



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

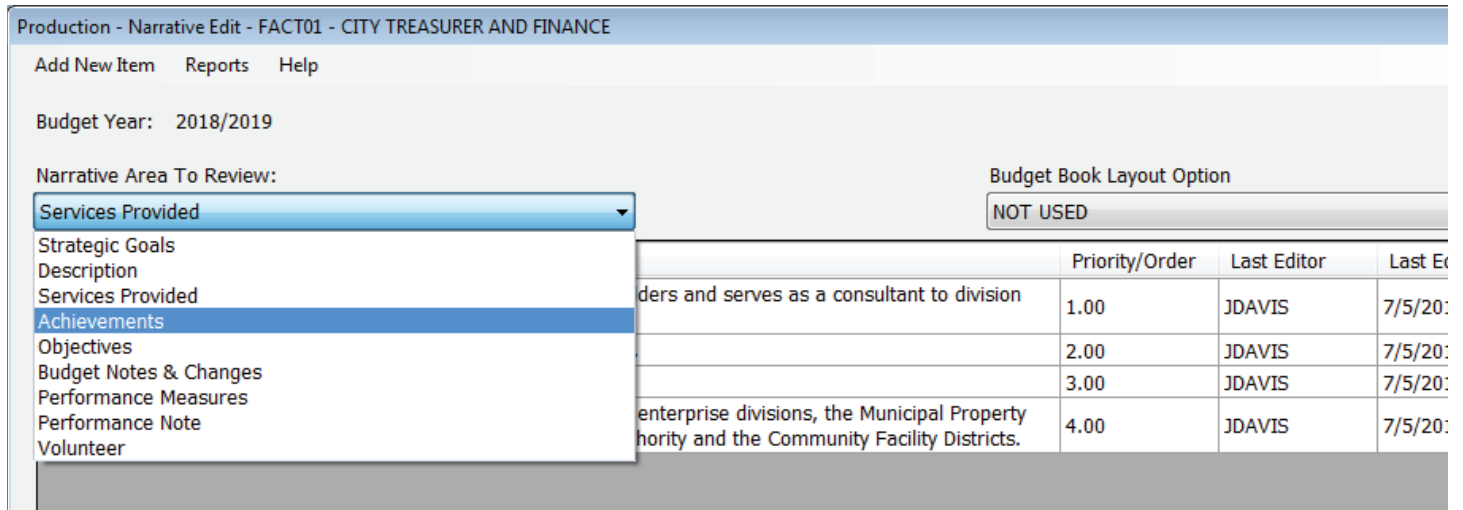


(2) The 'Services Provided' tab will be where you will edit/add your data. The Description field will have a spell check feature. (3) The 'Priority/Order' is the order the information will appear in the Budget Book. (4) After you make any changes select save (Bottom right hand corner of the screen). (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.

Production - Narrative Edit - FACT01 - CITY TREASURER AND FINANCE

Add New Item Reports Help

Budget Year: 2018/2019

Narrative Area To Review: Achievements Budget Book Layout Option: NOT USED

Actions	Narrative Item	Priority/Order	Last Editor	Last E
<a href="#">Edit</a>	Prepared strategic forecasts and assisted other divisions in developing long-term financial models to prudently manage assets and identify the city's capacity to fund future service and capital needs.	1.00	JDAVIS	7/5/20
<a href="#">Edit</a>	Evaluated optimum financing structures to mitigate debt service costs and reinforced the city's solid standing with credit rating agencies while maintaining Scottsdale's excellent bond ratings.	2.00	JDAVIS	7/5/20
<a href="#">Edit</a>	Evaluated cash flows and issued bonds to aid in the funding of the city's street and fire station capital programs.	3.00	PVERVER	8/9/20

- (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.

Production - Achievements - FACT01

More Actions Reports Help Exit

Budget Year: 2018/2019

**Instructions 1**

In one sentence each, describe any significant achievements by your division or department during the current fiscal year. The number of achievement should be consistent with the size and diversity of your operation (typically 3-5). Objectives, once completed, turn into achievements. Selected achievements will be edited for style and content and included in the annual report.

Example: "Acquired 2,400 acres of mountainous land from the Arizona State Land Department in the southern area of the Preserve with

**Achievements 2**

Prepared strategic forecasts and assisted other divisions in developing long-term financial models to prudently manage assets and identify the city's capacity to fund future service and capital needs.

**Priority / Order** 1.00 3

Include with Division 4

**5** Save

Last Edited by JDAVIS at 7/5/2017 7:13 AM 6

**Objectives**

Production - Narrative Edit - FACT01 - CITY TREASURER AND FINANCE

Add New Item Reports Help

Budget Year: 2018/2019

Narrative Area To Review: Budget Book Layout Option

Achievements

- Strategic Goals
- Description
- Services Provided
- Achievements
- Objectives**
- Budget Notes & Changes
- Performance Measures
- Performance Note
- Volunteer

NOT USED

	Priority/Order	Last Editor	Last E
other divisions in developing long-term assets and identify the city's capacity to fund	1.00	JDAVIS	7/5/20
to mitigate debt service costs and reinforced agencies while maintaining Scottsdale's	2.00	JDAVIS	7/5/20
aid in the funding of the city's street and fire station capital programs.	3.00	PVERVER	8/9/20

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."*

Production - Narrative Edit - FACT01 - CITY TREASURER AND FINANCE

Add New Item Reports Help

Budget Year: 2018/2019

Narrative Area To Review: Budget Book Layout Option

Achievements ▼

- Strategic Goals
- Description
- Services Provided
- Achievements
- Objectives
- Budget Notes & Changes**
- Performance Measures
- Performance Note
- Volunteer

	Priority/Order	Last Editor	Last
other divisions in developing long-term assets and identify the city's capacity to fund	1.00	JDAVIS	7/5/2
to mitigate debt service costs and reinforced agencies while maintaining Scottsdale's	2.00	JDAVIS	7/5/2
aid in the funding of the city's street and fire station capital programs.	3.00	PVERVER	8/9/2

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.

Production - Narrative Edit - FACT01 - CITY TREASURER AND FINANCE

Add New Item Reports Help

Budget Year: 2018/2019

Narrative Area To Review: **Objectives** Budget Book Layout Option: NOT USED

	Priority/Order	Last Editor	Last t
issuance and post compliance policies,	1.00	PVERVER	4/4/20
metadata.	2.00	PVERVER	4/4/20
ice expenses and debt service costs, evaluate ry to aid in funding the city's capital program.	3.00	PVERVER	4/4/20

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.

Production - Performance Measures - FAAC01 (unsaved)

More Actions Reports Help

Budget Year: 2020/2021

Item Instructions **1**

**Performance Measures**

Number of consecutive years awarded Certificate of Achievement for Excellence in Financial Reporting **2**

**Priority / Order**

**3** 1.00

Preview Data

Include with Division **4**

**Related Strategic Goals**

**5**  Seek Sustainability

Support Economic Vitality

**Statistical Values**

Parameter Name <b>6</b>	Parameter Values
Category <b>7</b>	Effectiveness
Note <b>8</b>	This certificate is
<b>Past Time Periods</b> <b>9</b>	<b>Past Period Values</b>
Actual 2017/18 <b>10</b>	45
Actual 2018/19 <b>11</b>	46

Save

- 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.

Last Year Projected 2019/20	12	<input type="text" value="47"/>
<b>Projected Data Elements</b>		<b>Projected Values</b>
Estimated 2019/20	13	<input type="text"/>
Projected 2020/21	14	<input type="text"/>
Numeric Display Format	15	No Decimals

- 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.

Statistical Values		
Chart Information		(Complete for Charts only)
Chart Title	16	<input type="text"/>
Y Axis Label	17	<input type="text"/>
Chart Target Label	18	<input type="text"/>
Chart Target Value	19	<input type="text"/>
Chart Scale Value	20	<input type="text"/>

- 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.

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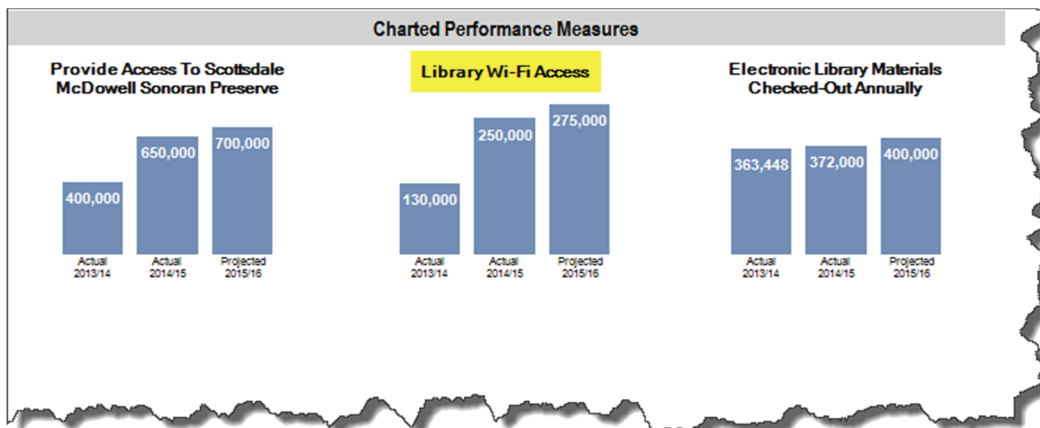
**Chart Performance Measures**

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

**Priority / Order**

2.00

[Preview Data](#)



## Performance Note

Performance Notes are designed to use as explanations for comments impacting multiple measures. This section/function is different 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.

	PriorityOrder	Last Editor	Last Edited
ertificate of Achievement for Excellence in	1.00	PVERVER	8/10/2018 12:35:56 PM
within city payment terms	2.00	PVERVER	3/14/2018 9:38:14 AM
disbursements	3.00	PVERVER	3/14/2018 9:38:45 AM

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.

Production - Volunteer - 0111

More Actions Reports Help Exit

Budget Year: 2018/2019

**Instructions**

For each 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, and full-time equivalent will be calculated automatically by dividing the total number of volunteer hours by 2,080. All boards, commissions and task forces must be included in this section. Select the "Board and Commission" or "Volunteer" category as appropriate. Make sure and account for all volunteers in your department or division.

**Volunteer 1**

The volunteer consultant researches, analyzes and consults on performance measures and process improvement methodologies and initiatives.

**Priority / Order**  
2.00 2

Preview Data

**Statistical Values**

Type	<span style="color: red;">3</span>	Volunteers
<b>Statistic Value</b>		<b>Description</b>
Number of Volunteers	<span style="color: red;">4</span>	1
Volunteer Hours	<span style="color: red;">5</span>	114

Save

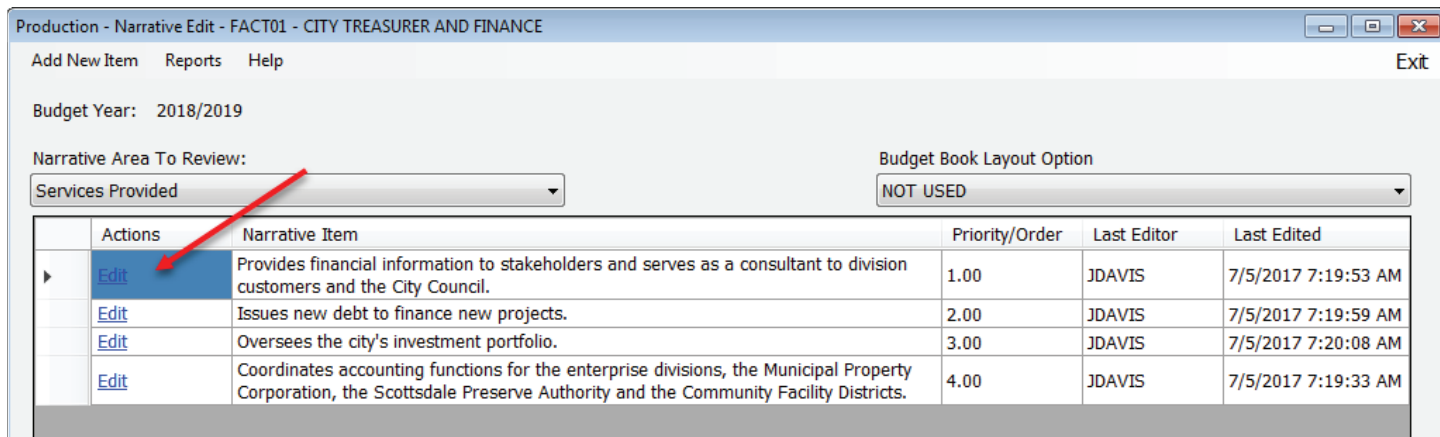
Last Edited by MLYNN at 7/12/2018 11:55 AM

- 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.

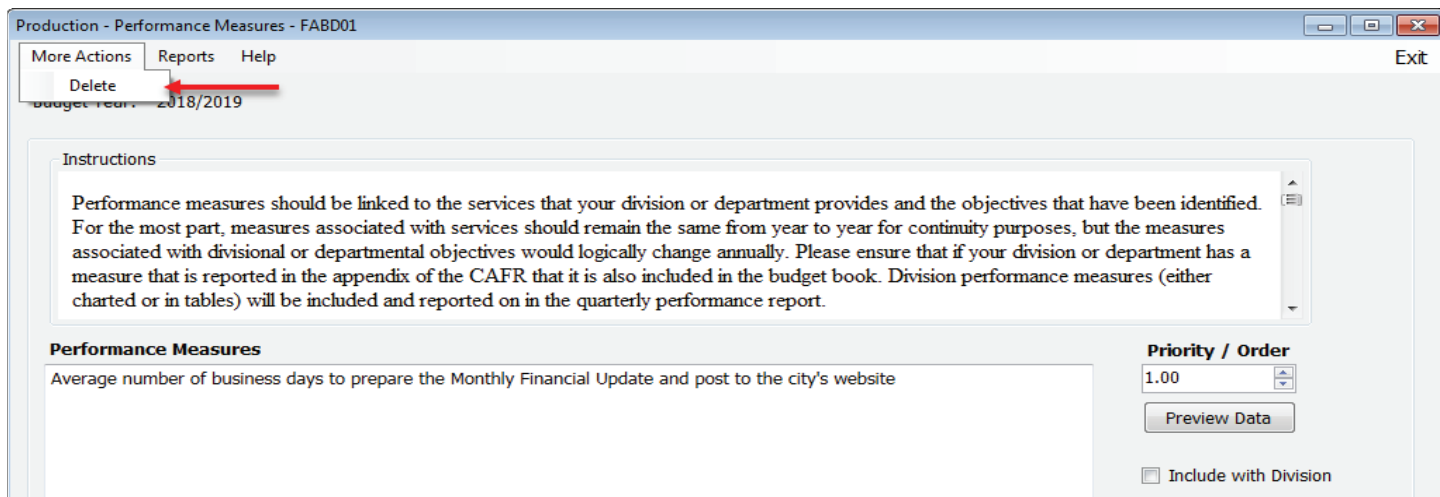
Click 'Save' in the right hand corner of the screen.

## Delete

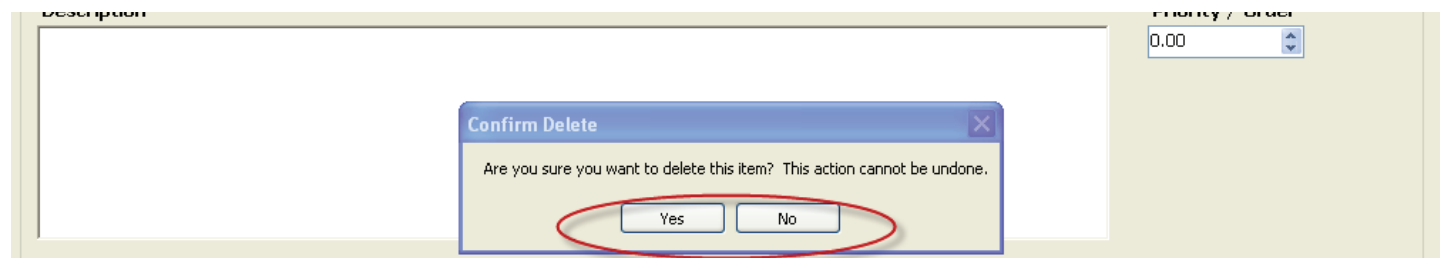
Every 'Narrative Area To Review' section will have a delete option. To delete data select the Click [Edit](#) on the data you would like to remove.



Once you are directed to the screen with the data, select the Delete option from the 'More Actions' drop down menu.



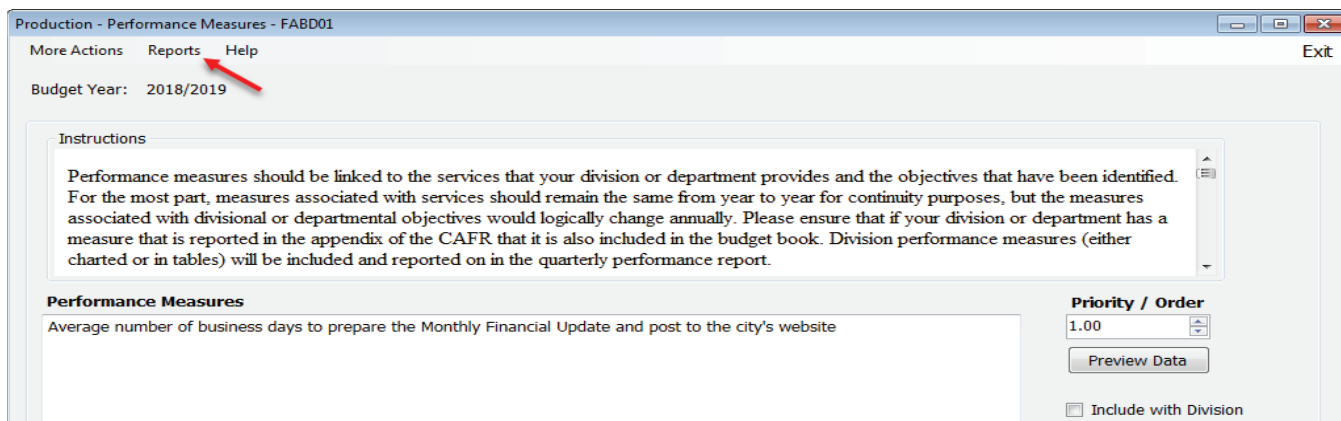
A confirmation pop up action will appear, click the [Yes](#) button to permanently delete the data or [No](#) if you wish to cancel the delete request.



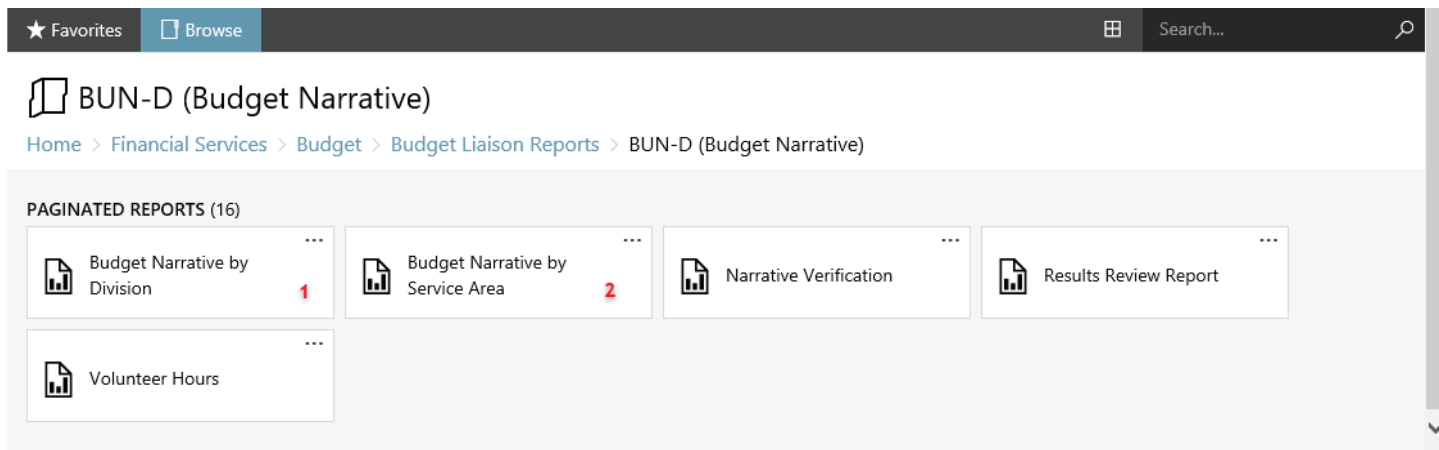


## REPORTS

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.

