



Town of Yountville

6550 Yount Street
Yountville, CA 94599

Staff Report

Agenda Item #: {{section.number}}E

Yountville Town Council Staff Report

DATE: March 2, 2021

TO: Mayor and Town Council

FROM: Kyle Batista, Financial Analyst; Celia King, Finance Director

PREPARED BY: Kyle Batista, Financial Analyst

SUBJECT:

OpenGov Online Budget Preview.

DISCUSSION/BACKGROUND

In the July 7, 2020 Town Council Meeting, the Council adopted Resolution Number 20-4002 approving the Town to move forward with implementing new Budgeting and Planning Software by OpenGov.

As reported in July 2020, OpenGov software is a powerful tool that will:

- Streamline the budgeting process,
- Create an online budget book, which is becoming industry standard and highly encouraged by the GFOA,
- Promote transparency via citizen engagement elements that the Town can utilize to tell the story of how revenues are generated and how they are used to provide services and complete projects,
- Create visual, customized Dashboards for staff and Town Council that deliver real-time financial information by simply logging into the portal, and
- Support the Finance Department when performing financial analysis and reports.

The purpose of this staff informational report is to:

- Provide Town Council with a preview of the Fiscal Year 2021/2022 Online Budget Book,
- Demonstrate how users, including Town residents, will be able to interact with the Online Budget Book,
- Demonstrate the use of the Transparency Portal which will allow Town residents to view real-time Town financial information simply by visiting our website, and
- Demonstrate how Town Council and staff will be able to interact with online Dashboards to view real-time financial information by simply logging into the OpenGov portal.

Finance Staff firmly believes that the use of OpenGov is in-line with the Town's Strategic Plan as it will promote transparency between the Town and its residents, public engagement, as well as ensure fiscal responsibility.

ENVIRONMENTAL REVIEW

Exempt per California Environmental Act (CEQA) Guideline, Section 15061(b)(3)

FISCAL IMPACT

Is there a Fiscal Impact? No

Is it Currently Budgeted? N/A

Where is it Budgeted? N/A

Is it Mandatory or Discretionary? Discretionary

Is there a Staff Resource Impact? No

STRATEGIC PLAN GOAL

Is item Identified in Strategic Plan? Yes

If yes, Identify Strategic Goal and Objective. **Engaged Residents:** The Town embraces our residents' commitment to community as seen through volunteerism, civic engagement, and public participation that enhances the quality of life in Yountville. **Visionary Leadership:** The Town's leadership maintains an open-minded, forward-thinking decision-making process. We value engagement and participation from all members of the community as we work together to create policies and plan for the future.

Briefly Explain Relationship to Strategic Plan Goal and Objective. Providing information to the Town Council regarding the status of the new OpenGov software ensures that they are informed on and involved with this project, allowing them the opportunity to engage with the process (Visionary Leadership). This software will support the Town's budget process and be used frequently by all departments and the Town Council to make financial decisions (Visionary Leadership). It will also promote transparency with Yountville residents through various engagement elements (Engaged Residents).

RECOMMENDATION

Receive and File