

# Office of Management & Budget

- **Develop the annual operating & capital budget**
  - Coordinate annual budget process with BCC departments, Constitutionals, and Independent Agencies
  - Develop a balanced Proposed Budget document
  - Develop a balanced Adopted Budget document
  - Develop Executive Budget document
  - Ensure compliance with TRIM requirements
- **Forecast and monitor revenues and expenditures**
  - Develop and update ten-year budget forecast document
  - Analyze revenues and expenditures for 52 funds
- **Develop the annual Capital Improvement Program**
  - Coordinate CIP process
  - Develop CIP document
  - Monitor Penny for Pinellas revenue and program

# Office of Management & Budget continued

- **Monitor and recommend amendments to the budget**
  - Administrative amendments
  - Board amendments
  - Board resolutions
- **Coordinate performance measurement and benchmarking**
  - Outcome-based performance measures using the Balanced Scorecard strategic framework
  - Coordinate participation in the Florida Benchmarking Consortium
- **Coordinate debt management and disclosure**
- **Provide grants coordination assistance**
- **Support the BCC's strategic planning process**

# Overview of Reductions

- **Department budget reduced by 15% or \$197K**
  - **Eliminated two budget analyst positions**
    - **Reduced non-core activities such as:**
      - Training to other departments
      - Performance measurement and benchmarking support
      - Strategic planning support
      - Capacity for special projects
      - Longer turnaround time to process budget amendments

# Key Programs & Service Levels

- **Development of the annual operating and capital budget**
  - **Annual customer (internal) satisfaction survey results**
    - Ratings for technical assistance decreased from 96% to 86%
    - Ratings for timely processing of budget amendments decreased from 86% to 75%
    - Overall satisfaction with OMB services decreased from 96% to 89%
- **Processing of budget amendments**
  - Increased average turnaround time to process budget amendments from 5 days to 6-8 days (15 days is mandatory requirement)

# Impacts to the Public

- **Impact to the public is minimal as OMB is an internal support department**
- **There has been an impact to internal customers (County departments and agencies)**
  - **Lower annual customer satisfaction survey results**
  - **Less support for special projects and management studies**
  - **Responsiveness to County Administration has slowed**

# Operational Changes

- Increased the workload of individual Analysts
- Reorganized the department to better distribute “peaks” and “valleys” of workload
- Created well-documented procedures for all key activities
- Increased communications amongst staff
- Limit non-core activities such as participation in special projects and management studies
- Planning to use unpaid intern or volunteers for assistance during key months
- Avoid significant unplanned changes to the budget process due to less flexibility from resource constraints
- Reduced support for performance measurement, benchmarking, strategic planning, and training offerings

# Unintended Consequences

- **Difficulty replacing two key staff losses during FY10 due to promotion and retirement**
  - Percentage of staff cross-trained in at least 3 major processes decreased from 88% to 63%
- **Workload in “reduction” years is almost double that of a “normal” budget cycle**

# Challenges & Lessons Learned

- **Challenges**

- **Loss of key staff**
- **Higher than normal workload**
- **Participation in OPUS project**

- **Lessons Learned**

- **Fundamental differences and challenges in managing reductions vs. increases**