



APPLICATION FORM

All applications must include the following information. Separate applications must be submitted for each eligible program. **Deadline: July 1, 2020.** Please include this application form with electronic entry. If you do not receive an email confirming receipt of your entry within 3 days of submission, please contact Gage Harter.

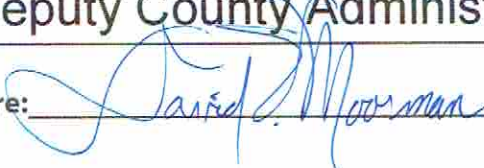
PROGRAM INFORMATION

County: Botetourt County
Program Title: Budget Task Force
Program Category: Organizational Development

CONTACT INFORMATION

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SIGNATURE OF COUNTY ADMINISTRATOR OR DEPUTY/ASSISTANT COUNTY ADMINISTRATOR

Name: David Moorman
Title: Deputy County Administrator
Signature:  6-30-2020

Virginia Association of Counties Achievement Awards Application 2020

Botetourt County – Budget Task Force

Executive Summary

Budgeting in Botetourt County had become stale. Like so many localities, the County's budget had become the purview of a very small group of senior staff who served as the guardians and creators of the County Administrator's recommended budget to the Board of Supervisors. This group would interview department heads and managers regarding the budget requests, ask questions, and make recommendations to the Board regarding the budget actions that needed to be taken. At the end of the process, department heads and managers would then receive the results and carry out their business, generally unaware of what had happened inside the "black box".

That process dramatically changed in 2018. Realizing that far too few people had enough understanding of budget development, County Administration and Finance staff decided to upend the process. The Budget Task Force was born. Drawing on staff from across all major operational areas, the goal was to both expand exposure to the budget process and allow for additional staff to use their breadth of professional and personal knowledge to the benefit of the budget. The goal was to increase collaboration all around.

As a result, in the budget cycles that the Budget Task Force has focused on the budget, staff have expressed increased confidence in the budget process, heightened awareness of the challenges facing all departments instead of individual interests, and a willingness to make tough compromises for the good of the entire County. The Budget Task Force should serve as a model to any locality seeking great staff engagement and collaboration.

Background and Problem

Since time immemorial, the staff budget process for Botetourt County has been a closed process. A small handful of senior staff, usually the County Administrator, Deputy County Administrator, Finance

Director, and maybe one or two others, would meet with every department head and manager individually in order to ask questions about their budget submission and then to make recommendations to the Board of Supervisors' Budget Subcommittee. Each department head or manager would try to justify his or her budget request to this small group and then receive the results at the end of the process once a budget was adopted by the Board.

While this process had the great benefit of tightly controlling budget information and ensuring a high level of experience in the people making budget decisions, other leaders in the organization were out of the loop. Moreover, the budget as whole, the single most important policy document produced by a County, was unimportant to most directors and managers. It was a process with which they interacted once a year, usually in an isolated and antagonistic manner. Buy-in with the entire budget and process was almost non-existent.

The Program

In late 2018, as the same small budget workgroup was beginning to plan out the coming fiscal year 2020 budget process, Deputy County Administrator David Moorman, who had just finished the Senior Executive Institute at Weldon-Cooper, proposed an idea to open up the budget process. Sensing the aforementioned problems and attitudes around the budget from other staff members, Mr. Moorman proposed creating a Budget Task Force. This larger group would have the full purview to review all aspects of the County's budget and make recommendations to the County Administrator and Budget Subcommittee.

That November, Mr. Moorman and the Director of Financial Services and the Assistant to the County Administrator began mapping out the new Budget Task Force. The primary goal of the Task Force would be to engage as broad of a group of organizational leaders as possible without becoming too unwieldy. The group decided that the permanent members of the Budget Task Force would be the Deputy County Administrator, the Director of Financial Services, the Assistant to the County Administrator, and

the Director of Technology Services. This would preserve institutional knowledge and ensure that technology, which touches every aspect of all departments, would be taken care of in the budget. Then, a spot on the Task Force was allocated to each of the major functional areas of the County, such as general government administration, community development, parks, recreation, and cultural, human services, and public safety. Directors and managers in each of those representative departments were asked to decide amongst themselves who would be the Task Force representative and alternate from each area. Availability, interest, and ability to think outside the box were all used to determine the representatives.

Once chosen, all of the Task Force members and alternates received a Budget 101 seminar in order to have a basic level of understanding of the entire Botetourt County budget and budgeting practices in general. Then, prior to meeting, each member received all budget submissions and requests from across the entire County to begin reviewing. During this initial individual review, members would ask each other questions and get more information from different directors and managers across the organization. This all laid the groundwork for the Task Force meetings.

Over the course of two weeks in February, the Budget Task Force met as an entire group for nearly 40 hours to review every revenue, expenditure, and capital line in the County's budget. After initial introductions and overviews to broad topics in the budget, the line by line review began. The group had immediate and vigorous discussions of each of the budget items. Every member was encouraged to think about the big picture and not his or her individual department. As a result, they started to see connections across departments and budget lines and became interested in a variety of projects and operations across the County. This led to the compromises and cuts that became the hallmark of the Task Force's work.

At the end of the two weeks, the Budget Task Force presented a recommended budget to the County Administrator for final review and submission to the Board's Budget Subcommittee. The Task Force members then reported back their work to the other directors and managers in each of their

functional areas so that as many people as possible could be kept informed of the budget development process in real time.

Results and Next Steps

The greatest result of the Budget Task Force was the creation of a more collaborative and inclusive process that allowed for engagement across the entire organization. This meant the budget was the result of greater critical thinking and more diverse opinions than prior in Botetourt's history. This had the added benefit of reducing the amount of work needed to be done to "sell" the budget to organizational and community stakeholders. Since so much broad input was received during the initial stages of the process, there were more champions for the budget than ever before.

The success of the Budget Task Force meant that it was an easy decision to continue its use for the fiscal year 2021 budget development cycle. It is anticipated that, with very few modifications, the Budget Task Force will continue to be the primary review committee for the County's budget.

Conclusion

The goals of the Budget Task Force were exceeded beyond expectation. The Task Force engaged with the budget in a new and innovative way for Botetourt County, providing broad input into a previously closed process. All involved were excited to be a part of the process and use it as a reference for how they think about other aspects of their work. In this way, every aspect of the County's organization has been improved by the Task Force.