

# Memorandum



CITY OF DALLAS

DATE January 4, 2013

TO Honorable Members of the Budget, Finance & Audit Committee: Jerry R. Allen (Chair), Tennell Atkins (Vice Chair), Monica A. Alonzo, Scott Griggs, and Ann Margolin

SUBJECT Financial Transparency Website

On Monday, January 7, 2012, the Budget, Finance & Audit Committee will be briefed on the City of Dallas' Financial Transparency Web Page. Please see the briefing material attached.

If you have additional questions, please feel free to contact me.

A handwritten signature in black ink, reading "Jeanne Chipperfield".

Jeanne Chipperfield  
Chief Financial Officer

## Attachment

- c: Honorable Mayor and Members of the City Council  
Mary K. Suhm, City Manager  
Thomas P. Perkins, Jr., City Attorney  
Rosa Rios, City Secretary  
Craig Kinton, City Auditor  
Daniel Solis, Administrative Judge Municipal Court  
A.C. Gonzalez, First Assistant City Manager  
Ryan S. Evans, Assistant City Manager  
Jill A. Jordan, P.E., Assistant City Manager  
Forest Turner, Assistant City Manager  
Joey Zapata, Assistant City Manager  
Stephanie Cooper, Assistant to the City Manager

# Financial Transparency Web Page

Budget, Finance, and Audit Committee  
January 7, 2013



# Financial Transparency Web Page

## Overview

- The goal of the Financial Transparency web page is to create a centralized site for citizens to locate all of the City's financial documents and expense statements

## Standard for Suggested Content

- Conducted a review to research industry best practices
- Determination made that the Texas Comptroller's "Leadership Circle" was the best standard for Dallas. The Leadership Circle began in 2009 in an effort to spotlight governments that are "opening their books"



Texas Comptroller  
Leadership Circle

## Scoring System

- The State's Comptroller scores the transparency web page Gold, Silver, or Bronze based on content
- Application submitted for the 2012 evaluation period; verbal indication given of achieving the Gold standard

# Financial Transparency Web Page



## State Comptroller's Scoring Criteria

### Gold Standard –

All three (3) of the major documents and eight (8) minor criteria for a total of 14 points.

Content Scoring Criteria <i>(Bold denotes <u>Major</u> Criteria)</i>	Max	Dallas
<b>Budget (Official Adopted Budget)</b>	2	2
<b>Annual Financial Report / Comprehensive Financial Report</b>	2	2
<b>Check Register</b>	2	2
Local Government contact information	1	1
Contact information for elected officials	1	1
Public information request - contact & instructions	1	1
Easy access to financial documents in 3 clicks or less	1	1
Budgets for three most recent fiscal years	1	1
Annual financial reports for three most recent completed reports	1	1
Check registers for three most recent fiscal years	1	1
Searchable check registers	1	1
Descriptive check registers	1	0
Visual representation of financial data	1	0
Current tax rates for local option taxes	1	1
Raw format budget	<u>1</u>	<u>1</u>
<b>Total Possible Points</b>	<b>18</b>	<b>16</b>

# Financial Transparency Web Page

## What Other Cities Participate?

- Other large cities that participate include: Arlington, Austin, Houston, Plano, and San Antonio

## Next Steps

- Continue to migrate financial content currently on the City's website to the new Financial Transparency web page
- Apply for GFOA's "Award for Excellence in Government Finance" in the area of "eGovernment"

# Financial Transparency Web Page Demonstration:

<http://www.dallascityhall.com/transparency/index.html>