

**FLORIDA LOCAL GOVERNMENT INFORMATION SYSTEMS ASSOCIATION  
TECHNOLOGY ACHIEVEMENT AWARD PROGRAM**



**Name of Nominee(s):** Kathi Pletzke

**Nominee's Jurisdiction(s):** Town of Longboat Key

**Submitter Name:** Kathi Pletzke

**Submitter Email** kathip@longboatkey.org

**Submitter Phone Number** 941-316-1999

**Submitter Mailing Address:** 501 Bay Isles Rd

**Submitter City & Zip Code:** Longboat Key, FL 34228

**Submitting for Individual Achievement Award**

**Jurisdiction Size:**

Please note that the jurisdiction size will be determined utilizing the latest information from the Bureau of Economic and Business Research (BEBR bebr.ufl.edu). For special districts, size is based on customer base and not population.

- Innovative Leadership in Management of Information Technology**
- Innovative Use of Technology to Service the Internal Operation of the Jurisdiction**
- Innovative Use of Technology to Service the Public**

**Submitting for Collaborative Achievement Award**

**Please list the Organizations**

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**Description:**

Please describe the significant achievement in no more than three pages (excluding any photographs, samples or examples). As much as possible please provide detailed measurable results or observable advancements.

## Fiscal Transparency 2014

Background: The Town of Longboat Key is in a unique position whereas we maintain and develop our own municipal software solutions. This latest endeavor has provided a solution for an issue all local governments deal with every year – budgets and finances.

The idea: tackle a complicated problem with a simple approach. Displaying data by revenues and expenses in all applicable areas, the Town's IT team created a visual interface that is accessible, elegant, and reachable to anyone with internet access. Just a click away from the Town's homepage, "Fiscal Transparency" presents a dynamic graphic that takes information directly from the Town's financial system and displays the budget in simple pie charts and tables. At a quick glance, citizens can know the answers to these questions:

- Exactly what taxes pay for
- Largest users of the Town's budget dollars
- The percentage of the budget year elapsed
- Trending and 5 year history on all account codes (electricity, fuel, travel, office supplies, overtime, etc.)
- If the Town is on target to collect budgeted revenues
- How much revenue for ad-valorem taxes was budgeted versus how much tax revenue has been collected
- What percentage of the total budget the town has already spent
- Fund Summary views
- Department Summary views

Fiscal Transparency has the answer for all of these questions and more.

The web-based program allows anyone to toggle between revenues and expenditures for all funds. The data is presented in a high level executive view and in easy to understand format. Drill downs to the department level are provided. Even departmental requests made through the budget justification process for increases in line items are presented for view. For citizens who like to take things a step further, the entire five-year history for all expenditures for every department is available for direct import to an Excel spreadsheet. WORD, PDF or .CSV format. Trending on expenditures is available in bar chart or spline chart format by individual or selected departments.

Modern .NET tools were deployed to add functionality and an elegant graphical user interface to current and historical data. For years, the Town captured and saved financial data regarding budgets, expenditures, every debit and credit, and their due-to due-from counterparts in our fund accounting system. In the past, this data was only regurgitated on printed copies of CAFR reports, balance sheets, trial balance reports and other forms of paper. Sometimes, these reports might also have been provided in 'electronic format,' dressed up in PDF form. Fiscal Transparency gives real meaning to 'BIG DATA,' a trend modern business needs to follow. In this example, the predictive analysis can be done by the citizen to see if their Town finances are on target.

Providing a modern interface to the Town's legacy financial system is more than just a visual representation of normally incomprehensible data. The Town's financial system interface on the back-end is 'green screen'. Any IT professional worth their salt will tell

you that data is data. Just because something is 'old' doesn't mean it needs to be replaced. A good product stands the test of time. Coca-Cola was invented in 1886. Sometimes just a little repackaging is needed to promote the brand. In this case, not only did the data get repackaged, but it is presented in usable and clear terms. Fiscal Transparency is a project designed to foster openness between Longboat Key's government and the citizens it serves.

The residents of Longboat Key have the power to inspect every detail of the budget, to understand it, and to voice their opinions on it. In the 60 days since the launch of the app, there have been 1025 'hits' to the site. In a Town of approximately 7,000 residents, that number represents a keen interest from real people. Thanks to Fiscal Transparency, local government may soon enter a new era of accountability.

For more information, visit the interactive application at [www.longboatkey.org](http://www.longboatkey.org) and click on the "Fiscal Transparency" button.

The image shows two screenshots from the Town of Longboat Key website. The left screenshot shows the main navigation menu with 'Fiscal Transparency' highlighted in a red circle. The right screenshot shows the 'Adopted Budget' page for Fiscal Year 2013-2014, featuring a pie chart and a table of revenue and expense details.

**Adopted Budget - Fiscal Year 2013 - 2014**

General Fund - 001

**General Fund - 001**

Revenues: Intergovernmental Revenues 8.30%, Franchise Fees 6.10%, Charges For Services 4.60%, Miscellaneous Revenue 2.97%, Nonrevenues 12.85%, Other 0.34%, Taxes 54.17%

Budget Year Elapsed: **65.21%**

Description	Budget	YTD Actual	YTD Actual/Budget
Taxes	6,610,727	4,320,433	65.35%
Franchise Fees	913,000	475,606	52.09%
Licenses And Permits	79,000	24,513	31.03%
Intergovernmental Revenues	1,333,040	733,084	54.99%
Charges For Services	686,100	486,174	70.86%
Fines And Penalties	22,500	890	3.96%
Miscellaneous Revenue	445,283	297,600	66.83%
Nonrevenues	1,804,489	1,075,107	59.60%
<b>TOTAL</b>	<b>14,976,583</b>	<b>11,234,442</b>	<b>75.08%</b>

### Town of Longboat Key Adopted Budget

Fiscal Year 2013 - 2014

General Fund - 001

View Fund Descriptions | View Quarterly Financial Report | View Account Summary

Revenues Expenses

#### General Fund - 001

Budget Year Elapsed: **65.21%**

Description	Budget	YTD Actual	YTD Actual/Budget
Operating Expenses	2,832,213	1,855,850	65.56%
Capital Outlay	189,000	137,474	72.74%
Revenues	11,897,475	6,377,163	53.68%
Special Fund Aids	24,500	23,980	97.87%
Non-encumbering encumbrances	12,000	0	0.00%
TOTAL	14,954,288	8,414,467	56.32%

Fund Revenue & Expense Details

Disclaimer

### Town of Longboat Key Adopted Budget

Wages / Overtime  
Object Code - 1402

Report to Excel | Account Summary | Home

Budget Year Elapsed: **44.11%**

Dept	Description	Fiscal Actual 2009-09	Fiscal Actual 2009-10	Fiscal Actual 2010-11	Fiscal Actual 2011-12	Fiscal Actual 2012-13	Fiscal Actual 2013-14	Approved	Actual	Balance	%	Act
130081	TOWN CLERK EXPENSES	438	704	290	72	403	790	228	818	21	36	31
140011	FINANCE EXPENSES	40	0	0	0	0	0	0	0	0	0	0
140014	INFORMATION TECHNOLOGY	336	180	24	11	110	600	428	74	82	82	82
140015	POLICE EXPENSES	28,113	48,894	38,058	27,716	39,129	10,000	8,099	11,701	41	41	41
200022	FIN & MARINE EXPENSES	214,380	200,000	141,709	122,429	123,949	116,788	88,328	48,222	39	39	39
200015	PUBLIC WORKS EXPENSES	2,418	1,278	1,707	2,079	780	0	99	99	100	100	100
200012	TRAVEL EXPENSES	4,090	820	603	622	728	0	1,800	0	1,800	0	0
200014	STAFFS EXPENSES	7,836	2,844	2,763	4,428	2,430	0	4,000	662	3,338	17	17
200016	WORKERS COMPENSATION EXPENSES	17,889	12,775	15,708	12,281	13,381	0	16,300	3,983	12,317	24	24
200018	INTERNATIONAL DEPARTMENT EXPENSES	20,972	33,274	34,268	29,846	21,821	0	30,000	14,511	15,489	48	48
200014	BUDGETS DEPT FUND REVENUE	3,329	2,431	1,384	2,376	-139	0	2,000	0	2,000	0	0

### Town of Longboat Key Adopted Budget

Wages / Overtime  
Object Code - 1402

Report to Excel | Account Summary | Home

Budget Year Elapsed: **44.11%**

Dept	Description	Fiscal Actual 2009-09	Fiscal Actual 2009-10	Fiscal Actual 2010-11	Fiscal Actual 2011-12	Fiscal Actual 2012-13	Fiscal Actual 2013-14	Approved	Actual	Balance	%	Act
130081	TOWN CLERK EXPENSES	438	704	290	72	403	790	228	818	21	36	31
140011	FINANCE EXPENSES	40	0	0	0	0	0	0	0	0	0	0
140014	INFORMATION TECHNOLOGY	336	180	24	11	110	600	428	74	82	82	82
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### Account Code Summary

Tuesday, March 11, 2014

Act	Description	Fiscal Actual 2009-09	Fiscal Actual 2009-10	Fiscal Actual 2010-11	Fiscal Actual 2011-12	Fiscal Actual 2012-13	Approved 2013-14	Actual 2013-14	Balance 2013-14	%	
1	Wages /	875,540	855,915	907,455	872,223	914,119	964,194	478,848	577,546	48	
11	Wages / Pay /	5,206	5,899	5,960	5,248	5,878	5,000	2,222	2,878	45	
1201	Wages / Regular	6,396,422	5,909,754	6,113,883	6,111,461	6,254,555	5,975,907	2,519,900	2,621,864	44	
1202	Wages / Auto	1,562	1,204	1,494	1,460	203	0	0	0	0	
1178	Wages / Pay /	85,500	82,577	83,792	83,754	88,422	79,124	18,347	46,227	49	
1209	Wages / Temporary	187,000	192,842	184,420	139,789	144,964	106,990	36,719	106,211	68	
1208	SM's Overtime	45,176	26,693	31,362	28,230	28,518	80,172	11,893	28,278	39	
1209	Severance	0	0	0	0	26,130	0	0	0	0	
1201	Wages /	65,850	64,179	107,175	95,513	114,440	125,190	57,795	42,455	50	
1201	Wages /	22,820	15,902	267	0	0	0	0	1,193	1,193	
1202	Additional	0	0	0	0	0	0	0	0	0	
1202	Wages /	34,026	11,840	13,932	10,719	24,900	12,200	2,930	5,400	23	
1403	Wages /	508,500	505,934	516,489	507,710	507,615	510,516	87,175	64,891	31	
1504	State Incentive	13,996	14,990	14,998	16,216	15,387	16,981	7,946	8,047	48	
2102	Full Benefit	828,209	800,959	862,176	844,118	976,242	922,399	222,129	419,362	42	
2101	Person	1,820,475	1,602,930	2,849,342	2,515,516	1,795,534	3,647,000	833,129	2,015,700	24	
2202	Pay Four	0	0	0	0	0	0	416,700	143,247	270,218	34
2400	Town Capital	185,890	170,548	94,929	71,460	74,878	66,907	79,581	18,953	43	
2402	Town Capital Def	156,720	129,867	176,477	176,839	174,878	164,814	49,490	48,847	37	
2401	Impairment	28,170	40,681	18,452	54,621	50,660	11,093	30,091	30,634	48	

### Town of Longboat Key Adopted Budget

Department Summary  
General Fund - 001

Report to Excel | Home

#### General Fund - 001

Five Year Capital Plan

Total	2013-14	2014-15	2015-16	2016-17	2017-18
Total	618,038	1,071,028	478,000	827,600	861,819

Revenues

Description	Fiscal Actual 2009-09	Fiscal Actual 2009-10	Fiscal Actual 2010-11	Fiscal Actual 2011-12	Fiscal Actual 2012-13	Approved 2013-14	Actual 2013-14	Balance 2013-14	%
Total	11,897,475	6,377,163	6,377,163	6,377,163	6,377,163	6,377,163	6,377,163	0	53.68%

Expenses

Description	Fiscal Actual 2009-09	Fiscal Actual 2009-10	Fiscal Actual 2010-11	Fiscal Actual 2011-12	Fiscal Actual 2012-13	Approved 2013-14	Actual 2013-14	Balance 2013-14	%
Total	14,954,288	8,414,467	8,414,467	8,414,467	8,414,467	8,414,467	8,414,467	0	56.32%

Budget Year Elapsed: **65.21%**

Disclaimer

### Department Summary General Fund - 001

Report to Excel | Home

EXPORT

Report to Excel  
Report to a CSV file  
Report to a PDF file

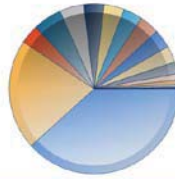
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Town of Longboat Key  
Adopted Budget

[Export Data](#) | [Fund Summary](#) | [Home](#)

Department Summary  
General Fund - 001



- Fire / Rescue
- Police Department
- Planning & Zoning
- Streets Department
- Information Technology
- Finance / Purchasing
- Public Works Administration
- General Services
- Tennis Center
- Town Manager
- Town Attorney
- Town Clerk
- Airies Department
- Neighborhood Services
- Municipal Buildings
- Town Commission
- Recreation Center
- Emergency Management

Department	Revised	Expended	Spent
Fire / Rescue	3,811,544	3,298,587	86.52%
Police Department	3,179,117	1,809,052	56.90%
Planning & Zoning	764,689	301,500	40.29%
Streets Department	755,287	471,794	62.99%
Information Technology	708,024	104,458	15.99%
Finance / Purchasing	687,867	312,134	44.88%
Public Works Administration	641,896	112,505	17.39%
General Services	487,879	112,230	22.80%
Tennis Center	478,768	327,582	68.42%
Town Manager	458,979	303,775	66.21%
Town Attorney	395,090	272,300	68.91%
Town Clerk	345,238	182,113	52.75%
Parks Department	230,304	102,000	44.29%
Human Resources	110,457	74,880	67.80%
Municipal Buildings	109,241	43,180	39.51%
Town Commission	34,432	9,182	26.67%
<b>Unallocated Funds</b>	<b>73,418</b>	<b>0</b>	<b>0.00%</b>