



*Advancing  
Government  
Accountability*



# *Giving Citizens Numbers They Can Understand: Citizen-Centric Reporting*

*New Opportunity to Connect Citizens  
and Government*



*Presented to the  
Massachusetts Municipal Association  
January 25, 2014*



*Advancing  
Government  
Accountability*

# Welcome and Introduction

## Moderator

*Ellen Allen, Selectman, Town of Norwell*

## Panelists

- *Craig C. Hall, Director of Accountability, AGA-Boston Chapter and Associate Faculty, University of Phoenix School of Business*
- *Orlando Pacheco, former Town Administrator, Town of Lancaster, Mass.*
- *Evie Barry, Director of Performance Reporting, AGA*





*Advancing  
Government  
Accountability*

# Agenda

- *Citizen-Centric Reporting*
- *Local Perspective and Case Study*
- *National Perspective and Technical Assistance*
- *Questions and Answers*





*Advancing  
Government  
Accountability*

# Citizen-Centric Reporting

*Craig Hall*





*Advancing  
Government  
Accountability*



## Why am we here?

- Because democracy is all about engaging the citizenry in the operations of government.
- Because governments exist to serve their citizens.
- Because citizens have the right to an understanding of how their government operates and if their tax dollars are being spent efficiently and effectively.
- Because all governments have a responsibility to provide that information in an easily understandable way.
- Because the majority of governments – federal, state, and local – are not reaching their citizens with some of the most significant



*Advancing  
Government  
Accountability*

# The Concept of Transparency: Theory and Practical Application

- Provide access to transactional information and provide the user aggregate data to filter and query.
- Provide customized reporting with context and background to explain what data means.



## Background on the CCR Model

- The Sloan Foundation provided funding for an initiative to provide understandable information to citizens.
- This initiative encourages governments to produce and publish an annual 'state of the government' report that is no more than four pages long.
- The reports, designed to be visually appealing, provide understandable information to citizens about the financial condition and performance of the government that answers the question, *"Are we better off today than we were last year?"*



*Advancing  
Government  
Accountability*



## What is the Citizen Centric Report Model?

Citizen-Centric Reports are annual "state of the government" documents that are not longer than four pages. The report is designed to provide information to citizens in an easy-to-read, understandable format about the financial condition and the performance of government over the past year.

The AGA Citizen-Centric Reporting model provides more useful and timely information to our citizens' thereby engaging taxpayer participation.



# How to Construct a Citizen Centric Report: Content Guidelines

## Page 1: Strategic Objectives

- *What do we do?*
- *Is there relevant demographic information?*

## Page 2: How are we doing – a performance report on key mission and services plan?

- *What is our mission?*
- *How do we plan on achieve goals and objectives in our strategic plan?*
- *What are some key performance measures and outcomes?*
- *What type of citizen input and feedback do we collect?*

# How to Construct a Citizen Centric Report: Content Guidelines

## Page 3: What are the costs for servicing the citizens and how were those costs paid for?

- *Explain budgetary information and relate to program areas.*
- *Explain budgetary information and relate to performance measures.*

## Page 4: Challenges moving forward – what's next? Future issues?

- *Discuss specific fiscal issues?*
- *Discuss organizational, staffing, or other programmatic issues.*



*Advancing  
Government  
Accountability*

# What are leaders and organizations saying about the Citizen Centric Report?

## New Opportunity to Connect Citizens and Government

“This initiative encourages governments to produce and publish an annual 'state of the government' report that is no more than four pages long. “ “...the report will make governments more accountable to their citizens and will help Americans become more educated citizens, who are better able to participate in government activities. “

“The initiative is ... working with public interest groups interested in civic engagement, good government, transparency and accountability...”

*This item was distributed to the League's leadership in a February 2007 email.*





*Advancing  
Government  
Accountability*

## Why should we accept the challenge?

- A new opportunity to connect citizens and government.
- A new way to report performance to the public.
- A new way to demonstrate accountability.
- A new way to provide transparency.





*Advancing  
Government  
Accountability*

## **The Secret Formula: *Primary Reasons for Success***

- Vision
- Leadership
- Staff participation
- Stakeholder involvement





Advancing  
Government  
Accountability

# Successfully Maintaining the Public Trust

*Americans Really Don't Like Their Government Right Now,*  
Government Executive, January 22, 2014

*State Governments Viewed Favorably as Federal Rating Hits New Low,*  
Pew Research Center for the People and the Press,  
April 15, 2013

*Local Government's Success in Maintaining Public Trust,*  
Public Management Magazine, International City / County  
Management Association, March 2012 • Volume 94 • Number 2

*Maintaining the Public Trust While Making Tough Choices,*  
Management Insights, Governing Magazine, January 5, 2011

*Trust in Local Governments,* Wendy M. Rahn and Thomas J.  
Rudolph, Chapter 13, 2002





*Advancing  
Government  
Accountability*

*Local Level  
Perspective and Case  
Study  
Orlando Pacheco*



# Case Study: Page 1



## A Report to Our Citizens

### Fiscal Year 2009 Town of Lancaster Citizen Centric Report

#### *Government*

Lancaster occupies about 28 square miles along the banks of the Nashua River in North Cer Massachusetts, on Routes 2 and I-190, just 16 miles northeast of Worcester and about 50 miles west of Boston. The average single-family home price last year was about \$302,600; the tax rate was \$14.84. The current population of the town is about 7,000. The Town is home to Atlantic Union College, a small 1-year liberal arts college in South Lancaster founded by the Seventh-Day Adventist Church 125 years ago.

The Town's Chief Executive Officers are the 3 member Board of Selectmen who are elected to three-year terms, as defined by Bylaw. The Selectmen appoint more than 20 boards and committees; they act as the primary policy-making body for a wide variety of issues, which affect the Town's development and provision of services.

*The Select Board is responsible for:*

Preparing and approval of the Town Meeting Warrants

- Budget formulation with the Finance Committee
- Confirming nominations for employment including all department heads and the Town Administrator
- Approval of all municipal contracts
- Approving various licenses, permits, and fees as designated by law

*The Town Administrator is responsible for:*

- Carrying out the policies and ordinances of the Board of Selectmen
- Overseeing the day-to-day operations of the Town

*The Town of Lancaster is a full service municipality providing the following services:*

- Police and Fire protection
- Ambulance Service
- Code/Zoning enforcement and building inspections
- Public works (Water, Cemetery, Tree, & Highway Operations)
- Public Health
- Library Operations
- Fiscal Services (Accounting, Tax Collection, Treasury, Assessing, MIS)
- Community Development and Planning
- Regional School System



Lancaster Town Hall, built 1908

#### Lancaster Employee Breakdown

*Full Time (30 hours or more) 42*

*Part Time (29 hours or less) 16*

*Call (Reserve Police, Dispatch,*

*Matrons, Fire, Ambulance) 55*

*Other (stipend based positions) 9*

*Seasonal (Recreation) 9*





*Advancing  
Government  
Accountability*



# Case Study: Page 2

## Accomplishments

Purchased the property at 32 Carter Street from the Secretary of Housing and Urban Development for \$1.00. The property was transferred to Habitat for Humanity of North Central Massachusetts for \$1.00 and will create an affordable housing unit for a local family.

The Town was awarded an Energy Audit Grant from the Division of Energy Resources. The Grant paid for consulting services to look at Library, Police and 2 Fire Stations to find measures of efficiency. The recommendations were implemented and paid for with proceeds from the Regional Greenhouse Gas Initiative Auction.

Working with the Planning Board and Board of Health the Town hired the firm Tighe and Bond to undertake a long-term re-use study of the capped landfill on Lunenburg Road. The study was paid for with a grant from the North Central Massachusetts Chamber of Commerce, and has resulted in the current plans for the landfill, which are to construct a solar array and increase passive recreation on the site.

Working with the Cable Advisory Commission the Town has finalized a 10 year video license renewal with Comcast. The license will transfer the responsibilities for public, education, and government access to a non-profit municipal corporation, Sterling-Lancaster Community Television, whose funding stream is secured in the license agreement

The Town has finalized plans to connect the municipal buildings on the Town Green to the sewer system. This will help facilitate the redevelopment of the former school buildings.

The Town also sold 3 parcels of land after consultation with the Planning Board. The parcels were placed out to a "request for proposal" and sold for a combined \$347,500. The 3 parcels were on Brockelman Road, Hilltop Road, and Narrow Lane respectively.

The Town has also adopted the Commonwealth's new expedited permitting law, MGL Chapter 43D for various site in North Lancaster. This was recommended in hopes of facilitating economic development in that area of town.

Adoption of the 2007 Master Plan, which was last updated in 1967, and has become the blueprint for all future planning, programs and legislation for the Town.

Codification of the Town's General and Zoning Bylaws, as well as all of the Regulations, into a single concise and re-numbered document referred to as *The Code of the Town of Lancaster*.

An Integrated Planning Overlay District (IPOD) which provides greater flexibility in accommodating mixed-use developments, while ensuring careful respect for existing neighborhoods, other developments, and the natural environment.

Stronger Site Plan Requirements that place more emphasis on stormwater management, parking lot design, landscape design, lighting and signage requirements, and traffic control.

A local Stormwater Management Bylaw and Regulations that require a stringent control process for the stormwater run-off on new construction and re-development sites.

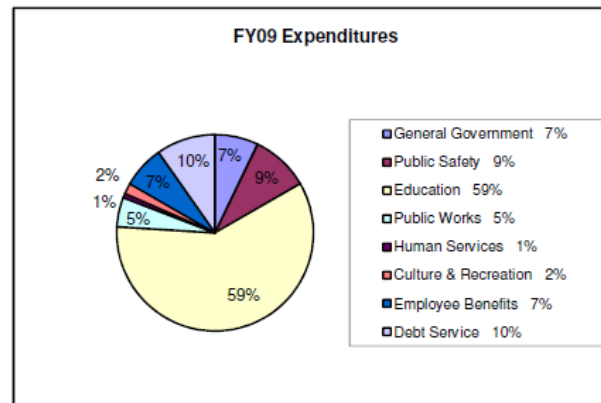
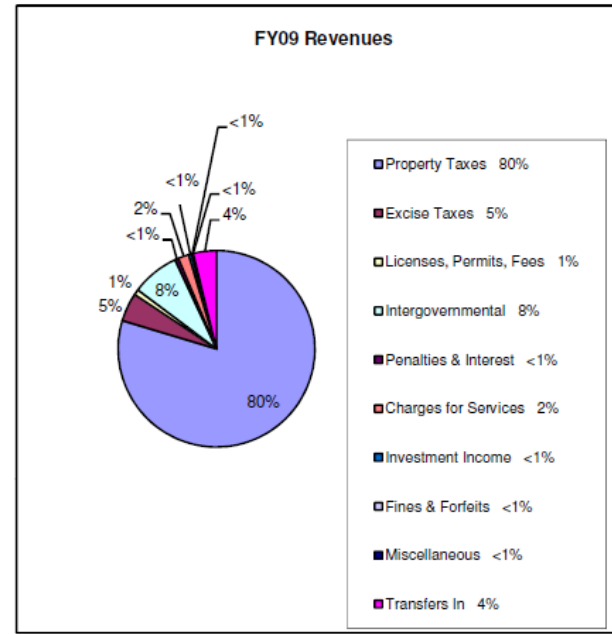
A local Wetlands Protection Bylaw and Regulations that places more stringent controls on resource areas such as buffer zones and vernal pools.

# Case Study: Page 3

## Fiscal Year 2009 Town of Lancaster Citizen Centric Report

| Revenues                   | FY09       |
|----------------------------|------------|
| Property Taxes 80%         | 12,675,339 |
| Excise Taxes 5%            | 749,043    |
| Licenses, Permits, Fees 1% | 143,216    |
| Intergovernmental 8%       | 1,246,721  |
| Penalties & Interest <1%   | 95,827     |
| Charges for Services 2%    | 278,291    |
| Investment Income <1%      | 75,541     |
| Fines & Forfeits <1%       | 33,482     |
| Miscellaneous <1%          | 11,200     |
| Transfers In 4%            | 606,600    |
|                            | 15,915,260 |

| Expenditures            | FY09       |
|-------------------------|------------|
| General Government 7%   | 1,120,601  |
| Public Safety 9%        | 1,498,934  |
| Education 59%           | 9,323,298  |
| Public Works 5%         | 764,748    |
| Human Services 1%       | 111,184    |
| Culture & Recreation 2% | 276,949    |
| Employee Benefits 7%    | 1,094,304  |
| Debt Service 10%        | 1,527,236  |
|                         | 15,717,254 |



For more detailed information please refer to the Lancaster 2009 Annual Town Report. Copies will be available at The Lancaster Town Hall, Lancaster Town Clerks Office And Thayer Memorial Library.



*Advancing  
Government  
Accountability*



# Case Study: Page 4

## *Future Initiatives*

Continuing the design for the Five Corners Intersection. By making this very dangerous 5-way intersection in to a 4-way intersection we will not only improve traffic flow for the community but make a dramatic safety improvement

Work with Conservation Commission and the Department of Fish and Game to build a new Cartop Boat Launch into the Nashua River to provide additional recreation benefits for our residents

Continue to support efforts to construct a Regional Household Hazardous Waste facility at Devens that will make disposal available for our residents at least 20 days per calendar year

Finalize design and begin construction to install a new sewer line on Duval Road. This will lead to additional economic growth in the particular area of town by facilitating in the expansion of Orchard Hills Athletic Club. The Town has secured grant funding to pay for both the design and construction of this project.

Continue to work towards building a solar array at the capped landfill on Lunenburg Road. The construction of this project will provide the Town with a significant amount of renewable energy at a low price per kilowatt hour for years to come

Work with the regulatory permitting boards and departments to create an expedited permitting manual. This will make the permitting process easier to understand and continue to facilitate economic growth where appropriate

Renovation of the former Memorial Elementary school into the New Lancaster Community Center.

Renovation of the Prescott Building, including the Mass. Historical Preservation grant.

Update of the Open Space and Recreation Plan

Enhance the intersection improvement at Lunenburg Road and Old Union Turnpike (rotary project)



Veterans Memorial on the Lancaster Town Green  
Dedicated on Veterans Day, November 11, 2006

**For More Detailed Information  
Please Refer to the Lancaster  
2009 Annual Report.**



*Advancing  
Government  
Accountability*

*National Perspective  
and Technical  
Assistance  
Evie Barry*





*Advancing  
Government  
Accountability*

# Current State of Government Reporting

## Problem

- Reporting too technical
- Distrust in government
- Where is the information

## Solution

- Clear and simple reporting
- Concise and non-technical reporting
- Complete and understandable reporting





*Advancing  
Government  
Accountability*

# AGA's Design Guidelines

- Visual Appeal and Readability
- Physical Layout
- Colors
- Images and Graphics
- Types and Fonts
- Use of Desktop Publishing Software
- Distribution of Report





*Advancing  
Government  
Accountability*

# Resources for Constructing a Report

- Citizen Centric reporting Fact Sheet
- Case study
- Content Guidelines Template
- Design Guidelines Template
- Toolkit for Media Outreach
- Technical assistance from the AGA and experts from local AGA Chapters





*Advancing  
Government  
Accountability*



## Selection of Completed Reports

- Suffolk, Virginia
- State of Texas
- Scottsdale, Arizona
- Dorothea Dix Psychiatric Center,  
Bangor, Maine
- Clark County, Washington  
Treasurer's Office
- Mercer County, New Jersey  
Improvement Authority





*Advancing  
Government  
Accountability*



# AGA Technical Assistance: National

The AGA National Office has a series of downloadable templates available for use:

- Microsoft Word
- Microsoft Publisher 2000 and 2010
- Excel 1997 and 2010 for Revenue/Expenses
- MAC Users...CS4 and CS5
- ESP files for Revenue/Expenses



*Advancing  
Government  
Accountability*



## **AGA Technical Assistance: Local**

The AGA Boston Chapter can provide guidance, technical assistance, and assistance in the national award program to members as well as non-members.



Advancing  
Government  
Accountability

# What's in it for you (and the taxpayer?)

## AGA Awards and Recognition Program

- A free peer-review evaluation of your submitted CCR report
- Earn a *Certificate of Excellence in Citizen-Centric Reporting*
- Earn a *Certificate of Achievement Certificate*





*Advancing  
Government  
Accountability*

# ***Thought Leader in Advancing Government Accountability and Transparency***

Association of Government Accountants  
[www.agacgfm.org](http://www.agacgfm.org)

Citizen-Centric Reporting  
[www.agacgfm.org/citizen/](http://www.agacgfm.org/citizen/)

AGA Boston Chapter  
<http://www.agaboston.org/>





*Advancing  
Government  
Accountability*

## ***Value-Added Benefit for MMA Members***

The AGA Boston Chapter is offering a discount to any MMA member (who attends this workshop or not) to attend the AGA Regional Professional Development Conference Thursday March 13, 2014 at Bentley University. There will be a more hands-on workshop for attendees on the Citizen-Centric Report and the AGA awards CPE credits, which make this even more advantageous.

The chapter agreed to offer MMA members a one-time reduced rate at the “Members Rate” instead of non-members.

The conference information is not on the website yet, but the rates are below.

|             | Member | Nonmember |
|-------------|--------|-----------|
| Early Bird  | \$110  | \$155     |
| Regular Reg | \$125  | \$170     |

The AGA Boston Chapter website is <http://www.agaboston.org/>.





*Advancing  
Government  
Accountability*

# *Questions?*





*Advancing  
Government  
Accountability*

## ***Contact Information:***

**Craig C. Hall**  
**[craighallfac@email.phoenix.edu](mailto:craighallfac@email.phoenix.edu)**

**Orlando Pacheco**  
**[opacheco@lancasterma.net](mailto:opacheco@lancasterma.net)**  
**978-365-3326**

**Evie Barry**  
**[ebarry@agacgfm.org](mailto:ebarry@agacgfm.org)**  
**703-684-6931, ext. 324**





*Advancing  
Government  
Accountability*

*Please complete your  
evaluation form for this  
workshop.*

*Thank you.*

