

Santa Cruz County Budget Website: Integrated, Interactive and Accessible

Overview: The Santa Cruz County Budget is presented online through an interactive and accessible website integrated with our strategic and operational plan, providing greater trust and transparency.

Challenge: The County's annual Proposed Budget traditionally included financial and staffing information, community and departmental narratives, and a point-in-time status of Operational Plan progress. Two budget revision documents were also created, ending with a stripped down final Adopted Budget book that eliminated all the narrative and operational context to serve as an accounts-based budget control document. This process consumed 60,000 pages annually and lacked continuity. Users of these disparate documents would need to manually navigate between versions to get to up-to-date figures and look in yet another location to view operational objectives progress.

Solution: County Administration Office staff worked with the Information Service Department to build a website that turned the static budget book documents into a singular integrated, interactive, accessible website. The website created the opportunity to include richer information than the previous format including weaving in the County's Operational and Strategic plans. By clicking through the site, the public could now see connections between spending, staffing and overall county objectives.

- *Integrated:* In the previous process, for a user to see the status of the Sheriff's budget, for example, they would need to find the department information in the Proposed budget and add or subtract any changes from each of several separate supplemental budget documents released during the County's budget process. This information was only consolidated months later in the Adopted Budget. The website combines this information so the user is able to view the most up-to-date figures in real time. In each department's budget details, users may see changes made with each phase of the budget process. The value of this tool was magnified by linking the County's live operational plan within the budget website.
- *Interactive:* The website offers limitless avenues for users to continue exploring. Users are empowered to select different aspects of the budget rather than physically flip through a book and can click to 'drill down' for more information. Within each department's budget service levels, users can see totals, descriptions, operation plan objects, funded staff and emerging issues. Many emerging issues contain external links for

more context to the work. For example, a Public Defender emerging issue links to a partnering non-profit's site that provides supplemental services. A GIS feature allows users to enter an address within the County to lookup services associated with that address including supervisor representation, adjacent County maintained road, and parks facilities. Through a partnership with OpenGov, the budget website also offers a transparency tool where users can further dissect financial information.

- *Accessible:* Not only does the site offer anytime, anywhere, detailed budget information to residents, but it is translatable into several languages through a Google translate feature. Additionally, it was designed to adapt to different screen types, notably it formats well to a smartphone. This was prioritized by the design team in recognition of limited at-home internet connections for many disadvantaged communities.

Innovation: To our knowledge, no other County in California has integrated their online Budget with live Operational Plan objectives. Most of the site was structured and designed in-house by talented Information Services staff. Linking Operational Plan objectives to the sources that fund them has helped strengthen and reinforce the County's progress on the Strategic Plan and Operational Plan objectives through real-time feedback.

Results: The sheer amount of new accessible information offered to the public improves trust and transparency in County functions. Furthermore, the County Administrative Office will recover 500 hours, and departments will recover a significant amount of hours previously devoted to document construction that can now be used for County priority objectives. The County also reduced natural resource consumption by going paperless.

Replicability: The County's online budget is highly replicable and scalable. Others wishing to replicate would only need to map out which levels of information to attach to each level of budget organization.

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Additional Materials – Links to the online website and user guide are provided below:

[PROPOSED 2022-23 BUDGET \(santacruzcounty.us\)](https://www.santacruzcounty.us/Budget/PROPOSED_2022-23_BUDGET)

[User Guide & Glossary \(santacruzcounty.us\)](https://www.santacruzcounty.us/Budget/User_Guide_Glossary)