



# Leadership Circle-Transparency

## Informing Citizens of Local Government Transparency

### **Introduction:**

This enhanced program is based upon a well known successful program developed and operated in the state of Texas. The NBBLO is now pleased to recognize local governments **across the nation** that strive to meet a high standard for online transparency. The NBBLO Leadership Circle program spotlights local governments that open their records and books to the public; providing clear, consistent pictures of spending; and sharing information in a user-friendly format that lets taxpayers easily *drill down* for more information. We offer a **free**, self-scoring process. The “**Gold**” designation highlights those entities that set the bar with their transparency efforts; “**Silver**” encourages those on the road to transparency, while “**Bronze**” is meant to inspire those just beginning their transparency journey.

Transparency requires an ongoing effort for all government entities. Receiving a “**Bronze**” or “**Silver**” designation paves the way for achieving greater transparency and attaining a “**Gold**” designation in the future. By qualifying for the NBBLO Leadership Circle for Transparency you will receive:

- Award at our annual conference of an 8 ½” by 11” certificate that acknowledges your Leadership Circle for Transparency Award level: **Gold, Silver or Bronze**
- Assistance in issuing a press release to your local news organizations
- The opportunity to spotlight your organization on the NBBLO Transparency list at [www.nbblo.org/leadership/transparency](http://www.nbblo.org/leadership/transparency)
- A digital “*NBBLO Transparency Leadership Certificate*” (*Icon*) that may be proudly posted on your web site to document your award. Those who click on your digital certificate will be transferred to the NBBLO web site to view a page confirming the award level and review the completed components of your application

Leadership Circle designations are valid for the calendar year in which the certificate was awarded. We suggest that entities review and update their qualifications in January of each year to re-qualify for Leadership Circle designation.



### **Instructions for Leadership Circle Award submittals:**

1. At the top of the **Application** page, enter the entity’s Web home page URL, the name of the entity being scored, the primary point of contact, phone, e-mail and mailing address.
2. **Transparency:** Enter the web link (url) which leads to the specified financial document or Click on the check box to indicate compliance.
3. **Scoring:** 38 points are the maximum possible. Your points are automatically tallied.
4. Your point totals will be automatically compared to the Leadership Circle Award Levels. At a minimum, **Gold** requires achievement of **all** gold designated requirements plus 30 points. **Silver** requires achievement of **all** silver designated requirements plus 20 points. **Bronze** requires achievement of **all** bronze designated requirements plus 10 points.

# Leadership Circle Application (Transparency)

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**Name of Entity/Jurisdiction**

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**Web Site Address**

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**Primary Contact**

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**Mailing Address**

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**Work Phone**

**Mobile Phone**

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**E-mail**

An email will be sent to the above email address. To be listed on the Leadership Circle website you must confirm receipt of the email by clicking on the enclosed link.

Each year you will be asked via email to reconfirm your functionality points.

## Definitions:

**Budget:** A budget serves as the financial plan for the city; county or governing body. It shows proposed spending and revenue, typically for a one-year period, in broad categories by office/department and by account type, such as salary, transportation or supplies. A more detailed budget may show data by month.

**Financial Report:** A financial report demonstrates how well the city; county or governing body managed within the proposed budget and plan. It includes a comparison of budgeted to actual expenses and revenues, typically for a one-year period, shown in the same broad categories and account types as the budget. Monthly financial or treasurer's reports are typically shown in summary only.

**Check Register:** A check register is a listing of line-item expenses showing the date, amount, to whom the payment was made, account type and purchase order number where applicable. Some check registers are searchable by vendor name and/or account type.



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Internet Functionality	Enter the web address (URL) which documents the functionality or Check the box if you comply.
<b>Financial</b>	
Council Meetings & Agendas published ( <i>Bronze</i> )	
Current and Previous Budgets Published ( <i>Bronze</i> )	
Current and Previous Financial Reports Published ( <i>Silver</i> )	
Check Register Published ( <i>Gold</i> )	
Navigation tab or graphic guides readers to page with all financial documents: budget, financial report and check register (1 pt)	
Date, Payee and Amount on check register (1 pt)	
Check register in a searchable format (2 pts)	
Drill down into summary balances (2 pts)	
<b>Contact Information</b>	
Local government contact information (email address and phone numbers) readily available via the web (1 pt)	
Names & contact information posted for current local elected officials (1 pt)	
<b>City Clerk</b>	
Municipal code published via the web and updated at least 2 times a year (1 pt)	
Resolutions and Fees updated at least 2 times a year (1 pt)	
Requirements for submitting public record requests are posted on the web (1 pt)	
Jurisdiction offers public records request data entry via <i>electronic</i> form and instant submittal (1 pt)	
Public records requests submitted over the counter are acknowledged with a written receipt. Those transmitted via email are acknowledged by return email within 48 hours (1 pt)	
50% of requests for basic public records such as resolutions, staff reports, etc that are under the control of the City Clerk are <b>offered</b> to requester within 5 business days (2 pts)	
Electronic transmission of requested public documents (1 pt)	
Retrieved electronic documents are provided via email free of charge (1 pt)	
City Clerk publishes metrics of public records requested, provided and quantifies the duration in between. Also metrics pertaining to other required duties such as receipt of process and publication of meeting minutes (2 pts)	
City Clerk is required to report any improper hindrance in the offering of public records. Such a report must be filed by the Clerk with the appropriate governing body (1 pt)	
All published PDF documents are searchable (1 pt)	

Ability to search public records via the web (2 pts)	
<b>Purchasing</b>	
Purchasing allows digitally signed electronically responses to formal Request for Proposals (RFPs) to be submitted for easy review, storage and city clerk retrieval (2 pts)	
A staff report shall be generated for <b>all</b> public procurements which clearly state the rationale behind the decision; this evaluation is made available for public inspection. (2 pts)	
Responses to <i>completed</i> public procurements are readily available for public inspection (2 pts)	
<b>General</b>	
Publishes list of active licensed businesses via the web (1 pt)	
The governing body has passed a <a href="#">resolution on Open and Transparent Governance</a> (2 pts)	
Citizen overpayments are refunded without a request from the taxpayer (2 pts)	
Citizen digital document signatures are accepted. Staff regularly signs documents digitally (1 pt)	
Documents are easy to locate and access with three clicks or less from the home page (1 pt)	
Good use of charts or visual images to make data more understandable Include number of charts (2 pt)	

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**Printed Name & Title of Authorized Party:** *(Judge for county, mayor or their designee for city).*

On behalf of the above named jurisdiction, I hereby certify that:

- I am the individual named above as Printed name & Title
- I am authorized to submit this application
- I agree to the terms of the program as published above and on the NBBLO website.
- The information submitted herein is true and correct.

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**Email Submittal and Date:**

*To submit your Leadership Circle Application:*

1. Please confirm your qualifications by completing all parts of this application.
2. Enter your full printed name above.
3. Please print or save a copy for your records.
4. Click on the Submit button.

If you have any questions, please contact Ken Musgrave via email at: [ken@nbblo.org](mailto:ken@nbblo.org).