

Budget Workshop

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Budget Workshop

- In this session, we will:
 - Discuss planning ideas
 - Analyze input to prepare "action items" to develop budget needs
 - Tips on making presentations
 - Group exercise
 - Select need/want
 - Make presentation to "Council"

Planning

- Need systematic approach to determine what is needed or desired by all interested parties so that budget requests are goal/objective based with supporting data

Planning

- Inclusion (Ask!)
The more support, the better the justification.
 - Internal
 - Court personnel – include all regardless of size of department
 - Judges
 - Meetings, retreat, email, etc.

Planning

- Inclusion, cont.
 - External
 - Prosecutors
 - Defense Attorneys
 - People filing cases (writing tickets)
 - School officials
 - Depending on size of city, City Manager, other city department staff
 - Possibly other court administrators
 - Citizens
 - Meetings, email, survey

Planning

- Needs and wants
 - Assessment of prior year
 - What is working and what isn't
 - Service improvements
 - Unexpected projects, etc.
 - Look at processes/procedures, numbers (performance measures), complaints, reports, etc.

Planning

- Needs and wants
 - Scan Next Fiscal Year
 - What are the upcoming issues, events, projects (a "want" by others could be a "need" for court)
 - Have goals/objectives been met
 - Is there an innovation or improvement that is desired
 - Consider personnel, special projects, technology, security, juveniles, physical surroundings, city initiatives, etc.

Analysis

- Analyze needs and wants (and upcoming issues)
 - Practicality
 - Supporting data (if not this year, start collecting data for next year)
 - Select those to be pursued (we'll call them action items)

Action Plan

- Prepare action plan(s)
 - Determine what is needed to implement each of the action items to be pursued
 - Include personnel costs, procedural changes, cost, etc.
 - May need to be able to measure results to report on effectiveness next year

Budget Presentation

- As required by your city
 - City Council
 - City Manager
 - City Clerk/Secretary
 - Judge
 - Other
- Presentation
 - 7 Tips

Presentation - Tip 1

- Know your audience
 - Learn what is important to the person/entity making decision – interests, concerns, “hot topics”
 - Identify personality type
 - Determine time constraints

Presentation - Tip 2

- Know your material
 - Properly research your topic
 - Clarity is important – stay on point
 - Have alternative(s) ready
 - Practice, Practice, Practice!

Presentation - Tip 3

- Know your environment
 - Be prepared to use the technology & room layout in efficient manner
 - If possible, view the room & execute dry run(s)
 - Sit through a council meeting (if applicable) to gauge the style of the meetings

Presentation - Tip 4

- Be/Look professional
 - Budget meetings should be treated as formal affairs - no joking around
 - Meeting may be in a public forum and media may be present
 - Have a professional appearance
 - A non professional appearance can inhibit your agenda and ruin your impression which in turn could have an adverse reaction to your presentation
 - Avoid inadvertent mannerisms

Presentation - Tip 5

- Keep it simple
 - Be succinct - lengthy explanations can lose the audience
 - Do not use too many PowerPoint slides or put too much on them
 - Get to the point
 - Ask / make point first, then explain
 - Excessive data can backfire
 - Keep some information in case of questions

Presentation - Tip 6

- Be truthful
 - Embellishment, exaggeration, over emphasis, etc. can obscure message
 - Avoid all-inclusive phrases such as “always” or “never”
 - If person/entity disagrees with your position or doesn't approve your proposal, don't argue or debate or tell them they “have to understand”

Presentation - Tip 7

- Be confident
 - Enthusiasm: GREAT
 - Hyperventilating: NOT SO GREAT
 - Cool, calm composure sets a positive and professional tone (deep breaths actually do work)
 - Smile
 - Enjoy yourself

Group Exercise

- Break into groups
 - Each group is a court
- Determine need / want
- Have support/data (improvise ☺)
- Put cost to it (simple)
- Have spokesperson be prepared to present to the “City Council”

Questions

- This planning can be used for action plans even if there is no budgetary requirement – just a business plan
- Questions?

Thank You

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