

PROJECT CATEGORY 15: ANNUAL REPORTS

TITLE: [Dollars & Sense: Your Practical Guide to County Finances](#) - SUBMITTED BY: xxxxxxxxxxxxxxxnamexxx

RESEARCH

Situation: As St. Lucie County's independently elected treasurer, accountant and auditor, Clerk Joe Smith strives to educate the public about their tax dollars. His office produces various financial publications to create transparency in government and inform county residents. While most are very technical and directed toward financial readers, *Dollars & Sense* is written for the general public. It is the office's version of the Popular Annual Finance Report (PAFR), which is voluntarily produced by many government agencies to easily explain public finances. *Dollars & Sense* is a condensed version of Comprehensive Annual Financial Report, a 250-page book of financial statements and documents. All county finance publications are accessible to the public at www.stlucieclerk.com/finances and consistently promoted by the Clerk's office throughout the year.

The following types of research were conducted:

- Interviews (informal primary) with Finance experts, Clerk employees, media, community leaders and elected officials to determine items of interest regarding county finances
- Content Analysis (informal primary) of local publications, tv stories to determine items of interest to the public regarding county finances
- Secondary Analysis (information secondary) of award-winning annual reports from across the country and award-winning magazine designs to benchmark against top finance publications produced by other nationally recognized government offices as well as top designs by international magazines.

PLANNING:

Goals: To produce the most visually appealing financial report by any Florida Clerk; To increase awareness of county finances and educate citizens

Key Publics: St. Lucie Property and Homeowner's Association presidents, Chamber of Commerce members, elected officials, civically active community leaders, jurors

Budget: The total cost to print the publication was \$1,185. An additional \$696 was spent in advertising. To conserve costs, only 1,000 full-color copies of the *Dollars & Sense* were printed.

Objectives

- To directly inform a minimum of 1,000 county residents about county finances within one month of release
- To engage a minimum of 10,000 residents to learn about county finances within six months of release.

Strategies

- Distribute guides to key businesses and elected/community leaders throughout the county
- Distribute at local community events, professional association meetings
- Promote guide online using the website and email communications, and social media

Tactics

- Distribute 1,000 guides to local non-profits, chamber of commerce, government agencies, elected officials, media, and private businesses
- Provide guide in the county commission chambers, law libraries and public libraries throughout the county
- Attend and speak at local HOA meetings, attorney Bar meetings, and other community events to distribute the guides
- Develop animated video to educate residents about key messages in the report
- Develop online messaging, graphics, promotional materials, and a video to drive online downloads and use on displays and television throughout the Clerk's office

EXECUTION:

Theme & Initial Draft: The Clerk's Administration and Finance departments met regularly from August to November 2015 to review possible themes of interest relating to the county's debt, investments, and spending. An audit of all reports previously produced by other Clerks throughout the state was conducted to determine best practices. Once a theme was determined, the team drafted each page of the guide and began writing material and developing graphs and visuals to accompany each section.

Print & Promote: Once the county's finances for the 2015 fiscal year were finalized in early 2016, the report was designed, printed and distributed in May 2016. The report was posted online, converted into a mobile-friendly flipbook, and a custom animated video was produced to help promote it on social media, the office lobby tv, and the website. A total of 295 publications were mailed to community leaders, elected officials, the media, attorneys, chamber of commerce members, and all elected Clerks & Comptrollers throughout the state. Approximately 600 copies of the report were distributed to government offices, public libraries, homeowners associations, and the general public at community events and professional meetings. The office also ordered a magazine stand for the lobby where the additional 105 were distributed to customers paying traffic tickets or reporting for jury duty or court services. An additional 920 citizens and 347 out-of-county citizens downloaded the publication electronically through the office's e-newsletters. The electronic version allows viewers to search text. A slideshow graphic for the website homepage was also developed to increase downloads directly from visitors to the website, which average more than 86,000 visits a month.

EVALUATION:

- Far exceeding our primary objective, an estimated 3,400 people were informed about *Dollars & Sense* through emails, public speaking engagements, community outreach, and the initial distribution to local businesses, chambers and government agencies and public buildings. All feedback about the guide has been very positive and three finance professionals rated the guide with top scores and acknowledged it is one of the best annual reports they have ever seen. Twenty-three local citizens appreciated the report so much that they requested more copies for their friends and family.
- More than 13,020 digital downloads of the guide were completed within five months of the guide being published online, exceeding our second objective of engaging 10,000 residents.
- Informal interviews with the general public and finance experts highlighted the best parts of the guide that should be repeated or expanded upon next year as well as areas that need better explanation.
- The animated video designed to promote the report reached 7,352 Facebook users and was viewed 3,200 times in one week.
- Our evaluation also concluded that improved TV coverage of the report may also increase readership for the following year.
- The online newspaper advertisement did not result in a larger number of downloads. The one day it was featured, the report was downloaded 67 times, which was not enough of a substantial increase to continue this advertisement.

SUPPLEMENTAL MATERIAL: See URL and pdf file of printed version of annual report